PAY@PC 3.0
Professional Edition

Release Version 3 for Window 7 / Windows 8 Pro
User Guide and Tutorial

Copyright © 2014, Advanced Merchant Solutions, Inc.
All rights reserved.

End-User License Agreement

This Advanced Merchant Solutions, Inc. End-User License Agreement (EULA) is a legal agreement between you (either an individual or a single entity) and Advanced Merchant Solutions, Inc (AMSI). software product identified above, which includes computer software and may include associated media, printed materials, and online or electronic documentation. The software also includes any updates and supplements to the original software provided to you by AMSI. Any software provided along with the software that is associated with a separate end-user license agreement is licensed to you under the terms of that license agreement. By installing, copying, downloading, accessing, or otherwise using the software, you agree to be bound by the terms of this EULA.

USE
You (an entity or a person) may use the software product identified above (the "software") on ONE COMPUTER within your organization.

TECHNICAL SUPPORT
The software is provided as is. Technical support is available only for registered users who have purchased the retail product or product downloads from the Internet. Technical support can be obtained by contacting AMSI at http://www.merchantanywhere.com

RESTRICTIONS
Except as authorized by the user documentation, you may not merge, modify, or adapt the software in any way, including reverse engineering, disassembling, de-compiling, or attempting to enable features that are disabled. You may not loan, rent, lease, license, or otherwise transfer the software or any copy of it to any third party outside your organization.

COPYRIGHT
All intellectual property rights in the software and user documentation are owned by Advanced Merchant Solutions, Inc. or its suppliers and are protected by United States, Canadian, and international copyright laws, other applicable copyright laws, and international treaty provisions. PRI retains all rights not expressly granted.

NO WARRANTY
Given the nature of this right to use, Advanced Merchant Solutions, Inc. make no warranty or representation, either expressed or implied, with respect to the software or related user documentation or technical support, including their quality, performance, merchantability, or fitness for a particular purpose. No Advanced Merchant Solutions, Inc. dealer, distributor, agent, or employee is authorized to make any modifications or addition to this warranty.

NO SUPPORT
You will not receive any technical support (other than automated support) from Advanced Merchant Solutions, Inc. in connection with your use of the software.

LIMITATION OF LIABILITY
Because software is inherently complex and may not be completely free of errors, you are required to verify your work and make back-up copies. In no event will Advanced Merchant Solutions, Inc. be liable for direct, indirect, special, incidental, economic, cover, or consequential damages arising out of the use of or inability to use the software, user documentation, or technical support, including, without limitation, damages or costs relating to the loss of profits, business, goodwill, data, or computer programs, even if advised of the possibility of such damages. Some states or provinces do not allow the exclusion or limitation of implied warranties or the limitation of liability for incidental or consequential damages, so the above exclusion or limitation may not apply to you.

SOFTWARE SCOPE
The software and any updates or supplements to it provided to you by Advanced Merchant Solutions, Inc. is licensed for a period of one year. Software updates should only be received through a secure Internet connection at https://secure.merchanttransacitons.com or by a CD ROM or other removable digital media device (i.e., thumb drive or flash card) distributed by Advanced Merchant Solutions, Inc. or by an authorized supplier.

PRERELEASE CODE
The software may contain pre-release code that is not at the level of performance and compatibility of the final, generally available, product offering. These portions of the software product may not operate correctly and may be substantially modified prior to the first commercial shipment. Advanced Merchant Solutions, Inc. is not obligated to make this or any later version of the software product commercially available.

TERMINATION
Without prejudice to any other rights, Advanced Merchant Solutions, Inc. may terminate this EULA if you fail to comply with the terms and conditions of this EULA. In such event, you must destroy all copies of the software and all of its component parts.

U.S. GOVERNMENT RESTRICTED RIGHTS
The software and/or user documentation is provided with RESTRICTED AND LIMITED RIGHTS. Duplication or disclosure by the Government is subject to restrictions as set forth in FAR 52.227-14 (June 1987) Alternate III (g)(3), FAR 52.227-19 (June 1987), or DFARS 52.227-7013 (c)(1)(June 1988), as applicable. Contractor/Manufacturer is Advanced Merchant Solutions, Inc., http://merchantanywhere.com.

GENERAL
This software is NOT FOR EXPORT.
© 2014 - Advanced Merchant Solutions, Inc.

Table of Contents

Welcome

Online Support 1
Technical Support 1
Program Updates 1
Program Requirements 2
DA-DSS PCI Compliance 2

Installation and Setup

Installing PAY@PC 4
Installing the Topaz Signature Pad Drivers 4
Launching PAY@PC 4
First Time Setup and Software Activation 5
Setting up Devices 8
Adding a full Access User 12

PAY@PC Screen Layout 14

Sales Screen 18

Transaction Manager

Screen Layout 20
Selecting Date Ranges 21
Selecting and Sorting by Sales Criteria 22
Modifying the Grid Appearance 22
Exporting Transaction Data 23
Working with a Sales Item 23

Program Settings

Devices 24
Company Information 29
Preferences 30
Services 35
Security 35
Online Tools 36

Tutorials

Processing a Sale Transaction 38
Issuing a Void or Credit 45
Adding/Removing Users 48

Trouble-Shooting

Pairing the Pocket Spectrum with a Bluetooth Device 51
Installing the Windows Generic Text Only Printer Driver 52

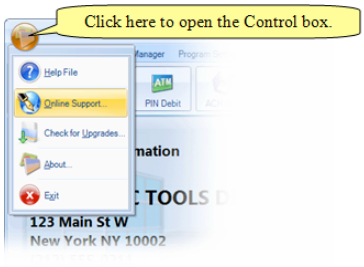
Welcome

Welcome to PAY@PC. PAY@PC is a Windows-based software product that allows you to process sales using the TransFirst Payment Processing Gateway. With PAY@PC you will be able swipe credit cards, process sales transactions, issue voids and credits, and print receipts. PAY@PC also includes server-side signature storage that allows you to archive your customer's signature for easier retrieval.

While PAY@PC makes it easy to process sales though an intuitive workflow, we recommend that your take a few minutes to read through the information present here and in the implementation guide. These two documents will allow you to setup our system to be PCI (Payment Card Industry) compliant and make you more proficient in setting up your various options, processing sales, and reading reports. You should have received the PAY@PC PA-DSS Implementation Guide from your merchant representative that provides you with important information in setting up your system. If you did not receive a copy of the PAP@PC implementation guide, you can view a copy of this guide from the support section of the product WEB Site (see below) or request a copy form your merchant representative.

Online Support

This is available by selecting the Online Support menu from the product's Control box.



Technical Support

Technical Support is available at:

- The Product WEB Site: https://secure.merchanttransactions.com/payatpc3, or
- Sending Email to: payatpcsupport@merchanttransactions.com

Program Updates

- Updates are available from the Product WEB Site.
- You can check for updates by selecting Check for Updates… from the Product's Control box or from the Online Tools > Upgrades button on the PAY@PC Toolbar

Program Requirements

In order to use PAY@PC your computer must meet the following requirements:

Operating System: *	Windows Vista (all Editions) Windows 7 (all Editions) Windows 8/8.1 Pro (all Editions) Windows RT / Surface is NOT supported
Processor Speed:	512 megabytes (MB) or higher (1 gigahertz (GHz) or greater recommended for Windows Vista)
Memory:	1 gigabyte (GB) RAM or higher
Hard disk:	300 MB (640 MB for 64 bit Operating System) includes space for .NET Framework 2.0/3.5
Display:	800 x 600 or higher resolution monitor 1024x600 or higher required for UMPC devices 1024x768 recommended
Other:	USB, Bluetooth 2.0 or higher, and/or Serial ports for external devices Signature Capture requires an external Topaz Signature pad PIN Debit requires a Verifone SE1000 PINPad

* Note: PAY@PC is not supported on the Windows Server, Windows NT platform, Windows Me, Windows 98 or earlier. PAY@PC does not work on Windows 8 Surface or Windows 8.1 Surface (also known as Windows RT). PAY@PC does work on Windows Vista (All Versions), but is no longer supported. It is recommended that PAY@PC be installed on 32-bit systems. PAY@PC will work on Windows 8 and 8.1 Professional. There is no performance gain when PAY@PC with it is installed on 64-bit systems, however, some third party devices such as USB-to-serial adaptors, Verifone Printers, and Signature tablets may not work with out the proper updated drivers.

DA-DSS PCI Compliance

In order to comply with the emerging standards of PCI Compliance, the AMSI PA-DSS Implementation Guide (IG) is included with PAY@PC. If you did not receive a printed version of this document from your merchant representative, it is included on the PAY@PC Installation Disk for your convenience. It is strongly recommended that you follow with read though the IG **BEFORE** installing and setting up PAY@PC using this document. PCI Standardization is an on-going process and as the PA-DSS standards are constantly evolving the IG is regularly updated. As such, the IG will supersede any information outlined in this User Guide and Tutorial.

You should contact your merchant representative once a year for the most recent version of the AMSI PA-DSS Implementation Guide. This should be version 2.02 or higher.

Installation and Setup

Before installing PAY@PC, make sure that you have read the **PA-DSS Implementation Guide** and understand what is required to make PAY@PC PCI Compliant with your system.

In most cases, you will receive a CD from your merchant representative. Use the CD to install the software, then keep the CD in a save place. If is also recommended that you keep your Merchant ID, password, and activation key (serial number) with your CD as well. Should you need to reinstall or repair PAY@PC at anytime in the future, you may need the CD and this information.

Installing PAY@PC

PAY@PC is available for download from the product web site and requires the Microsoft .NET Runtime. The product support page includes links and information of the where and how to install the .NET Runtime.

PAY@PC v3.0 Product WEB Site: https://secure.merchanttransactions.com/payatpctf3

Installing the Topaz Signature Pad Drivers

If you are using the Topaz Signature Pad to take signatures, please follow the installation instructions that come with the device. Once your tablet is installed and working properly, PAY@PC is designed to work with it immediately. However, operating systems and security settings between systems vary and should you not be able to make the tablet work with your particular operating system, we recommend that you repair the Topaz Signature Pad drivers by reinstalling the drivers.

The drivers can be obtained from Topaz directly or from our support section on the PAY@PC product Web Site.

Note: If you are installing the Tablet from the Topaz Installation CD for the first time...
Disconnect the Signature Pad from your computer!
You must first install the drivers before attaching the signature pad to the USB Port.
We also recommend that you reboot your computer first, before plugging in the signature pad.

Launching PAY@PC

The PAY@PC installation will place a shortcut onto your Desktop and in the Windows Programs Start Menu. From the Windows Start Menu select (All) Programs > PAY@PC. You should also be able to find it using the Windows search system.

Optionally, on Windows 8, you may create a Tile of the application if it is not automatically setup.

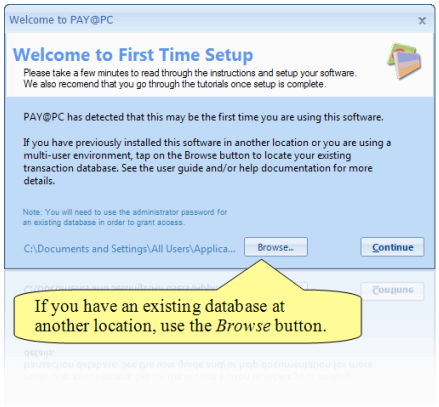
First Time Setup and Software Activation

When you start PAY@PC for the first time, the Welcome screen will appear.
There are six steps involved when setting up PAY@PC for the first time.

1. Setting up the Transaction/Sales Database
2. Entering a user name and password
3. Adding your Merchant Account
4. Activating the Software
5. Setting up your Devices
6. Adding a Full Access User

Setting up the Transaction/Sales Database

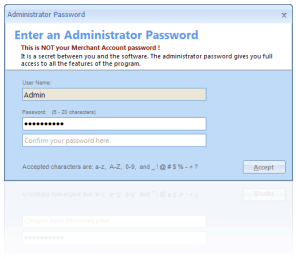
If you are using PAY@PC on multiple computers and have already installed PAY@PC at another location, you can share the sales data by selecting Browse For Data… If not, then select Next to continue with the installation process. If you are using an existing database, you will need to know the username and password that was used when it was first created.


Welcome to PAY@PC
Welcome to First Time Setup
Please take a few minutes to read through the instructions and setup your software.
We also recomend that you go through the tutorials once setup is complete.
PAY@PC has detected that this may be the first time you are using this software.
If you have previously installed this software in another location or you are using a multi-user environment, tap on the Browse button to locate your existing transaction database. See the user guide and/or help documentation for more details.
Note: You will need to use the administrator password for an existing database in order to grant access.
C:\Documents and Settings\All Users\Applica...
Browse..
Continue
If you have an existing database at another location, use the Browse button.

Entering a user name and password

The User Name and Password are **not** the same as you merchant account user name/ID or password used for your on-line merchant account. This information is used to gain complete access to the PAY@PC Software. You will need this User Name and Password when adding users, viewing log files, adding/updating merchant accounts, or accessing the database from the PAY@PC software located on another computer.

We recommend that you write this information down and keep it in a safe place. Due to security reasons, if you should forget this information, it can not be retrieve. Without this 'log-in' information you will not be able be load your exiting sales data into PAY@PC.


Administrator Password
Enter an Administrator Password
This is NOT your Merchant Account password !
It is a secret between you and the software. The administrator password gives you full access to all the features of the program.
User Name:
Admin
Password: (5 - 20 characters)
Confirm your password here
Accepted characters are: a-z, A-Z, 0-9, and _ ! @ # $ % - + ?
Accept

Adding your Merchant Account

In most cases when you start PAY@PC, you will be asked to select a merchant account. If you are setting up the software for the first time, the Merchant Account Logon screen will only have two options; (1) Add a New Merchant Account and (2) Use the Test Account. If you are using an existing database, then the Merchant Account Logon screen will display the information from that database.

It is recommended that you enter your merchant account at this stage. If you have more than one merchant account, enter the account you use most often.

To enter a new merchant account:

1. Tap on Add a New Merchant Account.

2. Enter your Merchant Account information.

    a. In this example company ABC CORP is used
    b. The Merchant Account, also known as the TC Log On ID, is 10011
    c. The RegKey is supplied by your Merchant Provider. It is 16 characters long.

3. Click the OK button.

    a. You must be connected to the Internet.
    b. If a Virus Checker or Firewall prompts for an *allow Internet connection*, select Yes.
    c. Once your merchant account and RegKey are validated, your merchant information is loaded into PAY@PC.
    d. Before you can use your merchant account, you must first activate the PAY@PC software.

Activating the PAY@PC Software

Once you have set up your primary merchant account, it is recommended that you activate the software. This involves contacting the PAY@PC Activation server through a secure (HTTPS/TLS) connection. Once your software is activated, you will be able to use your merchant account to process sales. You do not need to activate the software to use the Test Account. However, when trying to access any other account, PAY@PC will prompt you to enter your software activation code.

To activate PAY@PC, follow these steps.

1. Open up the activation screen by…
    a. Tapping on the Merchant Account you just added (you Primary Merchant Account)
2. Enter your **Product Activation Key**.
   The activation key will be located on the label of manual cover or on the inside flap of the CD Cover.
3. Tap the Activate Software button.
   After the activation key is validated online, you will be able to log into your account.

Tap here to activate the software.
Merchant Account Logon
Select Your Merchant Account
Choose from the list of options below.
Note: Software Not Yet Activated. Click here to Activate.
Use DEMO ACCOUNT TRANSACTION CENTRAL (MID:10011)
Add a New Merchant Acc
Use the Test Account
Tap here to use your Merchant Account. If the software is not yet activated, the Product Activation screen will open.
Enter Your Activation Key
Your must activate this software before using your merchant account.
Please enter the Product Activation Key that came with your software below. This activation key is valid for one computer and will allow you to process transactions using your merchant account.
If you need to use this software on another computer, additional activation keys can be purchased by contacting your Merchant Representative.
71111-11111-11111-111111
Activate Software
Cancel
Enter the activation key that came with your software here.
Merchant Account Logon
Select Your Merchant Account
Choose from the list of options below.
PAY@PC
Software activated. You may now log into your merchant account.
OK

After you activate the software, you will not need to activate it again.
In most cases, if you upgrade, uninstall, or accidentally delete the software you will not need to re-activate the software. If re-activation is required, the same activation key will work on the same computer.

If you do not have an Activation Key…
You may purchase one through the software by using the Manage / Purchase Activation Key link at the bottom of the Product Activation screen (requires Admin access) or on our product Web Site.

The activation key is good for one computer only. To use the software on multiple computers or in a network environment, each computer will require a separate activation key. Please purchase additional activation keys through the software or product wen site. Should you wish to retire a machine and move the activation key to another computer, you may do so using the Activation Management Screen by clicking on the Manage / Purchase Activation Key link.

Setting up your Devices

After choosing a merchant, you will be asked to set up your peripheral hardware devices.
This is covered in the next section.

Setting up Devices

When you start PAY@PC for the first time, you will be asked to set up your hardware devices.
It is recommended that your review any documentation comes with your device(s) before installing or plugging any device into your computer. In most cases, problems can be avoided by following the steps outlined in your hardware's documentation or by installing the software that came with the hardware **before** attaching the device to your computer. If you are running a 64-bit version for a Windows OS, be aware that some devices will not function correctly unless the 64-bit drivers are correctly installed. Should you have any questions about using a third party device, contact the device manufacture directly for any drivers and support.

Similarly, PAY@PC works with Bluetooth 2.0 (or later) compliant devices. While PAY@PC has been rigorously tested with numerous third party drivers and various operating systems, technology constantly evolves. For this reason, PAY@PC has a Test Feature for each hardware device. Thus, the following is recommended when installing any device to work with PAY@PC...

1. Start your computer and log on to your Windows OS as the System Administrator.
2. Read any documentation that came with the hardware that you will be adding to the computer.
3. Turn off any background software that might interfere with the installation of your hardware. (i.e., Virus Checkers)
4. Install any software that came with the hardware according to the manufacture's instructions.
5. If you are using any device that requires power, make sure that it is fully charged and/or plugged in.
6. If you are using a Bluetooth device, make sure that there is no interference within 3 feet (i.e., wireless telephone or cell phone) and that the Bluetooth device is about 1 to 2 feet away from the computer.
7. Also make sure that you have the latest drivers, security patches and software on your computer.
8. If you are using a 64-bit OS, check with the manufacture to see if a 64-bit driver is needed or available.
9. Once you setup and attach the hardware to your computer, use the Test link located on setup screen of for each device to make sure that it is functioning properly.

Special Note about using the Pocket Spectrum Bluetooth Card Reader and Printer:

Some notebook and desktop computers include Bluetooth hardware. The Pocket Spectrum works with the Microsoft and Toshiba Bluetooth connection software that is included on some notebooks. The Pocket Spectrum has also been tested with the Kensington (# 33348) and Belkin (F8T003 ver 2) USB Bluetooth adaptors. When pairing the Pocket Spectrum using the Bluetooth software on your computer, you must select the Serial service where you will be prompted to enter a passkey. The passkey is 1000. You will also need to assign a COM Port for this connection. When pairing the Pocket Spectrum with your computer, follow the Bluetooth Pairing instructions that came with your computer or particular USB Bluetooth Adaptor.

Card Reader

PAY@PC works with most serial, USB, Keyboard, and Bluetooth 2 and 3 track card readers. A list of tested readers is below. For generic serial card readers, the communications settings for the hardware must be set at 9600,N,8,1.

List of tested 2 Tack Readers:

- Pocket Merchant (Serial Model)
- Pocket Spectrum (Bluetooth Model – Passkey 1000)
- Pocket iMerchant, iSpectrum, and PriFlex models
  (used the Spectrum setting and Bluetooth 3.0 with passkey required)
- SEMTEK Mini Swipe Reader USB (#9473)
- SEMTEK Keyboard Readers
- SEMTEK 9600 Serial Readers

To choose a card reader…

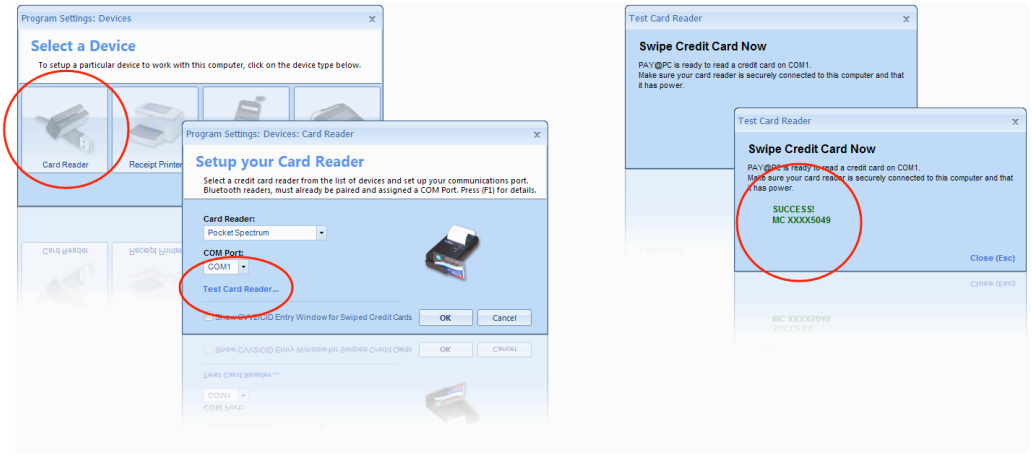
1. Select Program Settings > Devices.
   The Select Device window will appear. This window automatically appears if it is the first time you are running the program after installation.

2. Select Card Reader.

3. Choose a card reader from the list
   For Bluetooth and Serial devices, select the COM Port (Note: If you are using Bluetooth, a COM Port should already be assigned after pairing. See the *Special Note about using the Pocket Spectrum Bluetooth Card Reader and Printer*).

4. Test the card reader by…

   a. Tapping on the Test Card Reader link.
   b. Swiping a credit card through the reader.


Program Settings: Devices
Select a Device
To setup a particular device to work with this computer, click on the device type below.
Card Reader
Receipt Printer
Program Settings: Devices: Card Reader
Setup your Card Reader
Select a credit card reader from the list of devices and set up your communications port. Bluetooth readers, must already be paired and assigned a COM Port. Press (F1) for details.
Card Reader:
Pocket Spectrum
COM Port:
COM1
Test Card Reader...
OK
Cancel
Test Card Reader
Swipe Credit Card Now
PAY@PC is ready to read a credit card on COM1.
Make sure your card reader is securely connected to this computer and that it has power.
Test Card Reader
Swipe Credit Card Now
SUCCESS!
MC XXXX5049
Close (Esc)

Receipt Printer

PAY@PC can work with most graphics-capable printers and a select number of receipt printers.

- Windows Default Pinter
- Pocket Merchant / Pocket Spectrum (iMerchant, iSpectrum, PriFlex)
- Verifone P250
- Samsung Bixolon

To choose a receipt printer…

1. Select Program Settings > Devices
   The Select Device window will appear.

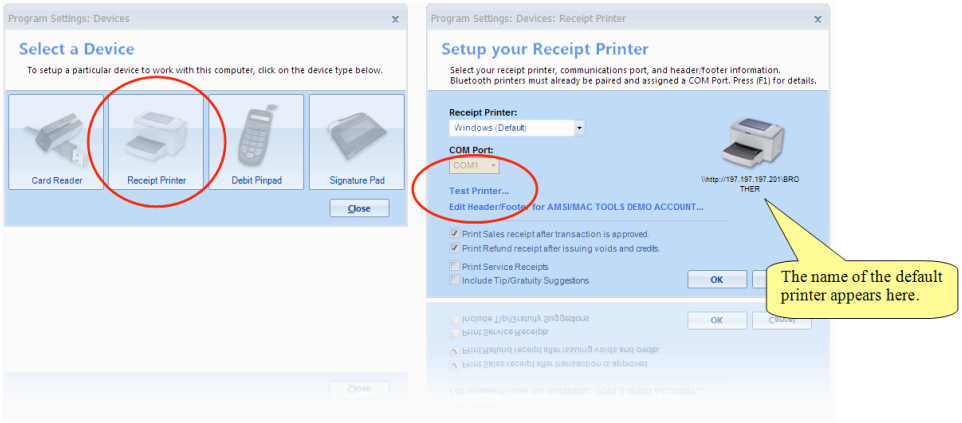
2. Select Receipt Printer

3. Choose a printer from the list

   For Bluetooth and Serial devices, select the COM Port (Note: If you are using Bluetooth, a COM Port should already be assigned after pairing. See the *Special Note about using the Pocket Spectrum Bluetooth Card Reader and Printer*).

   When using the Windows Default printer, then name of the printer will appear under the image.

4. Test the printer by tapping on the Test Printer link


Program Settings: Devices
Select a Device
To setup a particular device to work with this computer, click on the device type below.
Card Reader
Receipt Printer
Debit Pinpad
Signature Pad
Close
Program Settings: Devices: Receipt Printer
Setup your Receipt Printer
Select your receipt printer, communications port, and header/footer information.
Bluetooth printers must already be paired and assigned a COM Port. Press (F1) for details.
Receipt Printer:
Windows (Default)
COM Port:
COM1
Test Printer...
Edit Header/Footer for AMSI/MAC TOOLS DEMO ACCOUNT...
Print Sales receipt after transaction is approved.
Print Refund receipt after issuing voids and credits.
Print Service Receipts
Include Tip/Gratuity Suggestions
OK
The name of the default printer appears here.

This screen also allows you to automatically print approved receipts, setup receipt headers and footers, and to display service receipts that can include tip suggestions.

See also:
Devices: Receipt Printer
Trouble-Shooting: Pairing the Pocket Spectrum with a Bluetooth Device
Trouble-Shooting: Installing the Windows Generic Text Only Printer Driver

Signature Pad

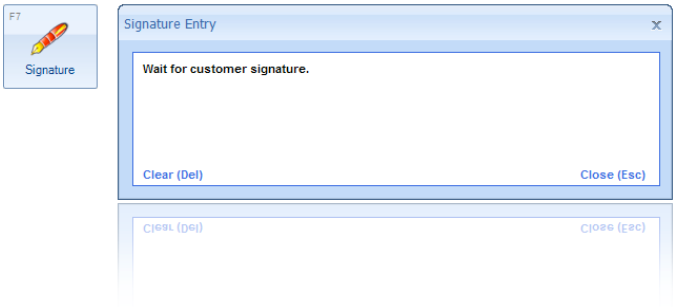
PAY@PC works with the SigGem 1x5 Topaz HSB Series signature pads which are available from your Merchant Provider. To setup your signature pad:

1. Install the Topaz Driver (if not already done).
   See Installation and Setup: Installing the Topaz Signature Pad Drivers.

2. Start PAY@PC and select Program Settings > Devices > Signature Pad

3. Select Topaz Signature Pad from the dropdown list.
   You can also test the signature pad and select it to automatically appear after a credit card is swiped.

   To change the auto-prompt feature, go to Program Settings: Preferences on the ribbon and select the User and Program Preferences Wizard tab. The signature prompt can also be shown by clicking on the Signature workflow button for Credit Card sales.



Encrypted Pinpad

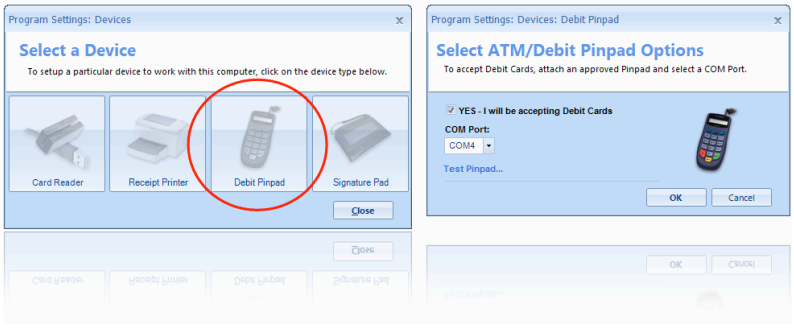
When processing PIN Debit (ATM) transactions, a REG Key* and encrypted (debit) Pinpad are required. PAY@PC supports the Verifone 1000SE Pinpad and must be attached directly to a serial port on your computer using the supplied cable. If you intend to use a USB-to-Serial cable adapter it must be PCI compliant in order to maintain the PA-DSS Compliance of this software. The use of this cable is beyond the scope of this manual and you must follow the installation and setup instructions that came with the USB-to-Serial cable adapter.

To use the Pinpad:

1. Select Program Settings > Devices.
   The Select Device window will appear.

2. Select Debit Pinpad.
3. Choose YES – I will be accepting debit card.
4. Choose a COM Port.

5. Test the Pinpad by tapping on the Test Pinpad link and following the message prompts.


Program Settings: Devices
Select a Device
To setup a particular device to work with this computer, click on the device type below.
Card Reader
Receipt Printer
Debit Pinpad
Signature Pad
Close
Program Settings: Devices: Debit Pinpad
Select ATM/Debit Pinpad Options
To accept Debit Cards, attach an approved Pinpad and select a COM Port.
YES - I will be accepting Debit Cards
COM Port:
COM4
Test Pinpad...
OK
Cancel

* See the section on *Program Settings: Company Information* on how to obtain and enter your REG Key.

Adding a full Access User

Once you've completed the above steps, follow the tutorial Adding/Removing Users and add a Full Access user with your name, even if you are the only one using the software. It is strongly recommended that you use your Full Access account instead of the Administrator account when performing day-to-day sales transactions. When you need to access administrator functions; simply logon as the administrator, perform those functions, and log off.

Administrator Functions include:

- Adding/modifying merchant accounts
- Adding/modifying users
- Adding/changing the transaction database
- Viewing/exporting security logs

PAY@PC Screen Layout

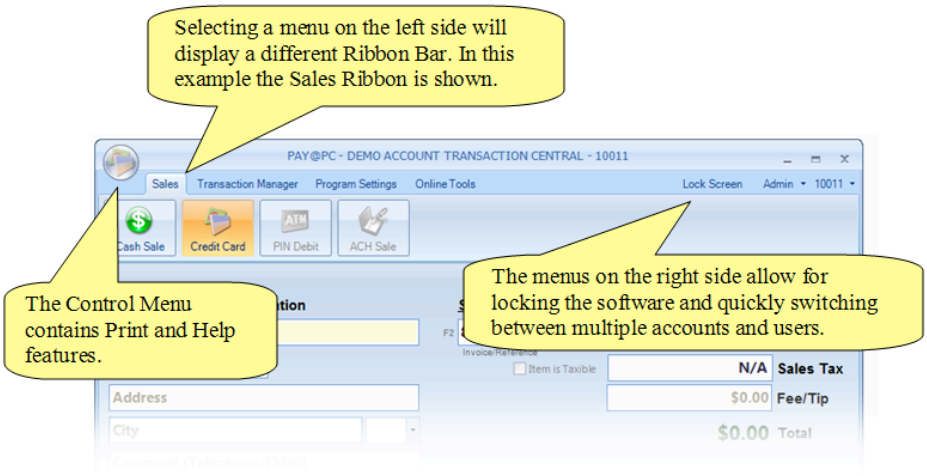
The PAY@PC screen will automatically default to the sales screen when you first log on.
The PAY@PC main screen is dived into an upper and a mid-to-lower pane. The upper pane contains a series of navigation and common items for the software. The mid-to-lower pane will change with respect to the type of sale being performed or for using the transaction manager.

The upper pane is divided into the following:

- Main Screen Layout
- Control Menu
- Ribbon Bar
- Lock Screen Menu
- Account Switching Menu
- User Switching Menu

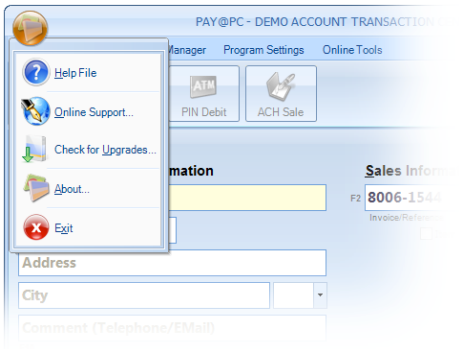
See also:
Sales Screen
Transaction Manager

Screen Layout



Control Menu

The control menu gives access to the PAY@PC Help file, WEB-Based support and product upgrades, the About Box (where you can view the current version information), and Exit button. You can also exit the program by clicking on the window's X (close) button.



Ribbon Bar

PAY@PC contains 4 ribbon bars that are accessible by clicking on the left menu items. These are:

- Sales Ribbon
- Transaction Manager Ribbon
- Program Settings Ribbon
- Online Tools Ribbon

Locking the Software

PAY@PC includes a quick locking feature that allows your sales data to be protected from unauthorized use. If multiple users have access to PAY@PC or you work at a public location, the Lock feature will come in handy.

To lock the software, click on the Lock Screen menu item located on the top-right.
Tapping on a locked screen will bring up the Logon Window were you enter your User Name and Password. PAY@PC will remember the previous user that logged in.

It is recommended that you save any new sales data before locking the screen, otherwise someone logging in with different security settings and credentials will not be able to save your data.

When logged on as the Administrator, you will automatically be logged off after 15 minutes of inactivity. Thus, it is recommended that you only use the administrator account when accessing administrator functions rather than performing sales transactions.

IMPORTANT NOTE:
If for some reason you cannot log back it or get locked out of the system, but wish to exit the program, click on the Exit Program link at the bottom left of the Logon Screen. Any unsaved information will be lost.

Quick Account Switching

This feature is available if PAY@PC contains more than one merchant account.
This feature can be turned on/off from the User Program and Preferences General tab. See the *Program Settings: Preferences: General* section for details on how to access this feature.

If the user only has access to one merchant account or if the software has not yet been activated, then this feature will be disabled.

Quick User Switching

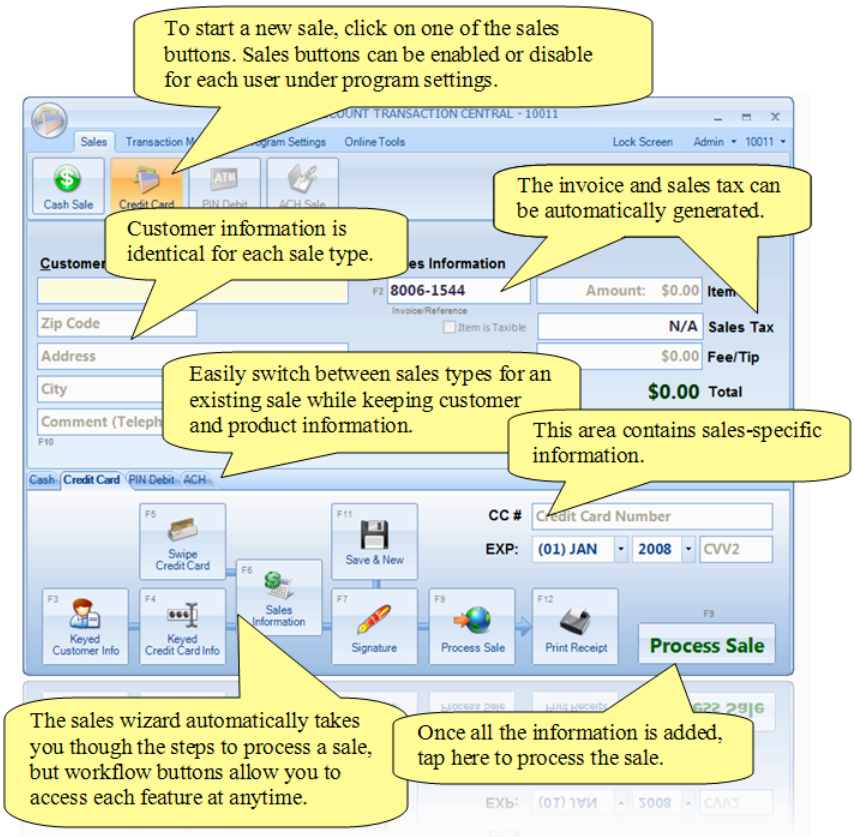
This feature is available if PAY@PC has more than one user setup. To setup multiple users, see the tutorial on *Adding/Removing Users*.

This feature can be turned on/off from the User Program and Preferences General tab. See the *Program Settings: Preferences: General* section for details on how to access this feature.

Sales Screen

The Sales Screen is where you will spend most of your time inside PAY@PC.
Tap on the Sales Menu, then choose one of the fours Sales Type buttons on the ribbon bar to start a new sale. In some cases, a sales wizard will appear and take you through each step required for processing a sale. To switch between sales types for the current sale, tap on the tabs located above the Workflow buttons.

Screen Layout



Using the Workflow Buttons

The workflow buttons are specific for each sales type and allow access to various features.
For example, if a signature pad was setup under Program Settings, then the Signature workflow button will be enabled and can be used to display the signature window. If a receipt printer is setup, then the Print Receipt workflow button can also be used to print unapproved sales/service receipts.

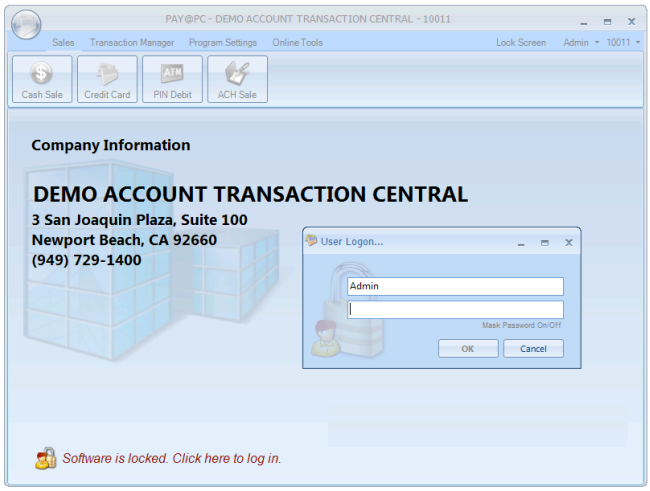
To switch between sales types for an existing sale, use the tabs directly above the workflow buttons. This is ideal in cases were a credit card may be rejected and you need to switch to a cash transaction. Switching between sales types keeps you exiting customer and sales information until you are ready to process the sale.

Locking the Screen

PAY@PC comes with a software screen lock feature. The Lock Screen menu item at the top right of the program will display the company information and time once it is used. This prevents "roving eyes" from view potentially sensitive data.

To log back in using your User ID and password, tap anywhere on the window.

It is recommended that you save your sale first, before locking the software. If a different user logs into PAY@PC any existing sales data will be lost (while PAY@PC does warn the new user that any exiting unsaved sales data could be lost, the security features do not allow a different user to save sales data).



Processing Sales

Once all the information is entered for a particular sales type, tap on the Process Sale button.
If the New Sales Wizard is used and the Prompt to Process if Complete option is turned on (default) under the User and Program Settings Wizard Tab, then you will see a confirmation prompt for processing the sale.

With the exception of cash sales, a secured internet connection is required to obtain an authorization code for approved transactions. Please see the PA-DSS Implementation Guide for additional information on making your system secure.

Once the sale is completed, the approval screen appears. If the Auto-Print Approved Sales Receipts option is turned on (default) under the User Program and Settings Printer Tab, a sales receipt will also be printed.

If you do not have enough information to process the sale, it can be saved and resubmitted at a later time by using the Transaction Manager.

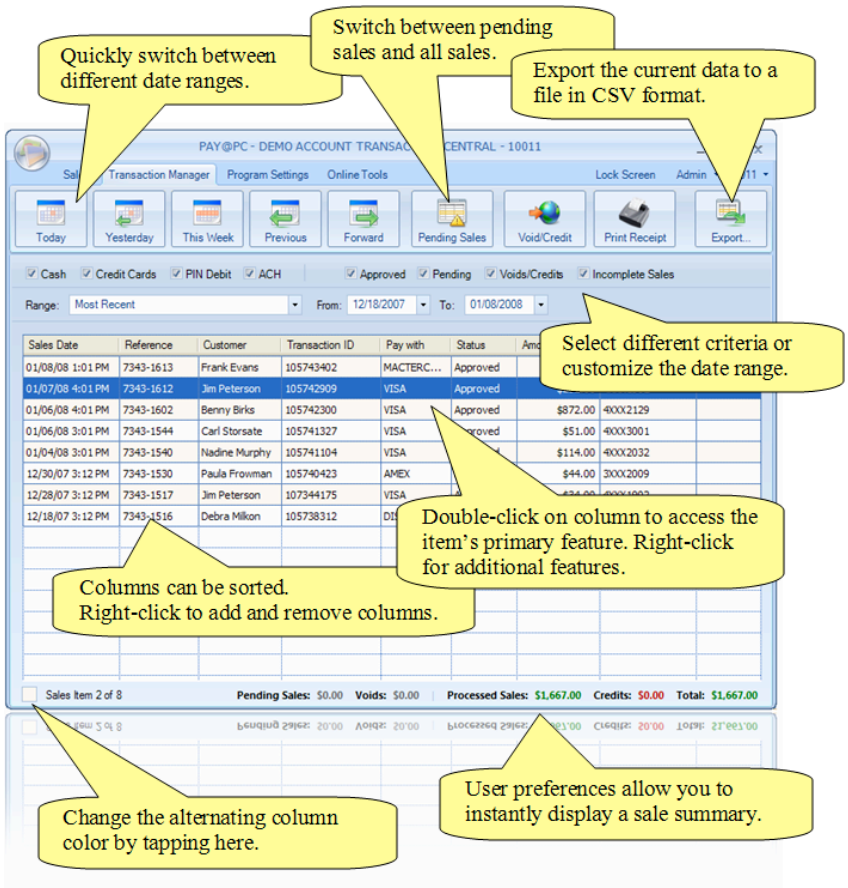
See also:
Program Information: Preferences: Wizards
Program Information: Preferences: Printer
Transaction Manager: Working with a Sales Item
Tutorials: Using the Transaction Manager

Transaction Manager

While it is recommended that you use the online Transaction Central account to access your historical sales data (see *Online Tools: Transaction Central* for details), the PAY@PC Transaction Manager will also allow you to scroll though your transaction data.

The Transaction Manager allows easy access to processing pending sales, issuing voids and credits, and printing receipts. For detailed sales analysis we recommend that you use Transaction Central.

Screen Layout

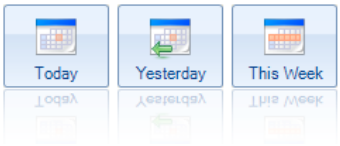


Selecting Date Ranges

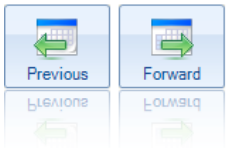
When first entering the PAY@PC Transaction Manager, the date range is set to Most Recent.
This is a list of the 100 most recent transactions.

To change the date range, use the following…

Today, Yesterday, This Week Buttons:
Use the Today, Yesterday and This Week buttons to quickly switch between fixed date ranges based on the current date.

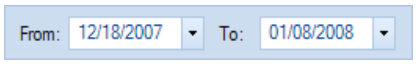


Previous and Forward Buttons:
Use the Previous and Forward buttons to move forward and backwards according to the date range specified in the From/To calendar list boxes. For example, if the date range is one month, then the Previous button will move one month back from the From date and the To date will become the From date. The Forward button will move the date range forward until it reached the current date.



Range Dropdown List
This list contains a number of popular date range formats used in accounting. Once you set a date range using this method, use the Previous and Forward buttons on the ribbon bar to compare sales dates and trends.

Custom Date Range:
The date range can also be customized using the From and To calendar list boxes. Once this range is set, you can use the Previous and Forward buttons to compare trends.



Selecting and Sorting by Sales Criteria

PAY@PC contains two sales criteria:

- Sales Type
- Status

By checking on/off these features, you can isolate specific transactions.
By clicking on the column headings, you can also sort the transactions in an ascending or descending direction according to the information in that column.

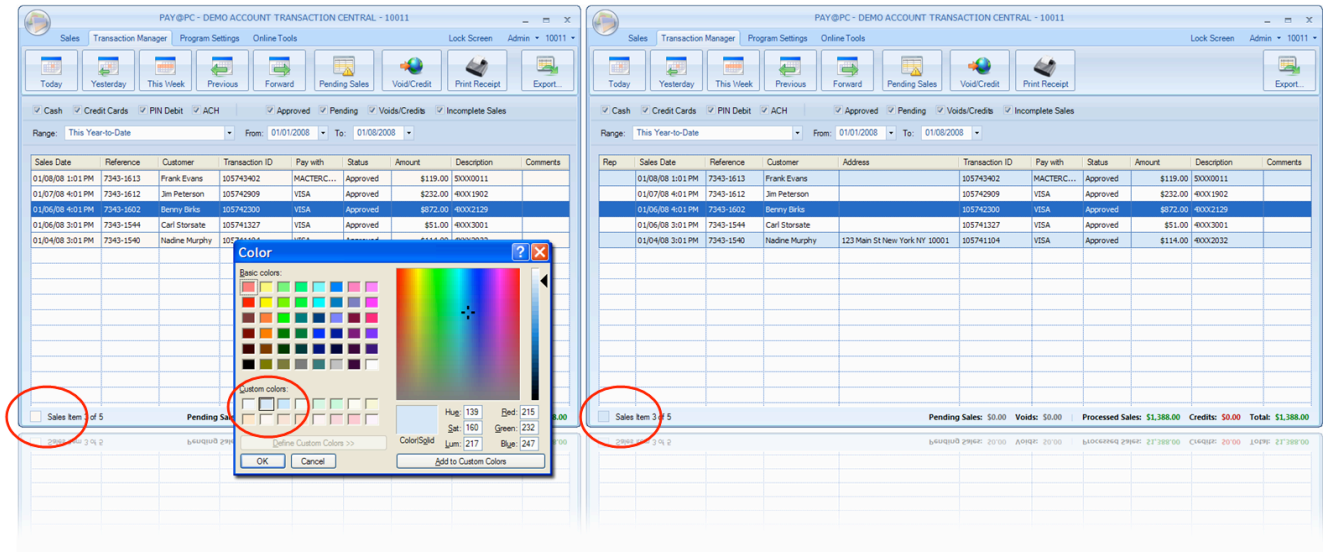
For example, when issuing a credit, it is recommended that the Approved and Void/Credit status are both set on and that the data is sorted by Reference or Transaction ID. Thus, when issuing a credit from the Transaction Manager, both transactions (original sale and void/credit) appear next to each other.

When processing pending transactions, it is recommended that the Approved and Pending status options are both set on and that the transactions are sorted by Reference or Customer. If the Approved status option is off and a pending transaction is approved from the Transaction Manager, then it will not appear in the list.

Modifying the Grid Appearance

Columns can be added and removed from the Grid. To do this; right-click on any transaction and select which columns to change from the popup menu. By default the Rep ID and Address columns are set to off, where the Comments column is set to on.

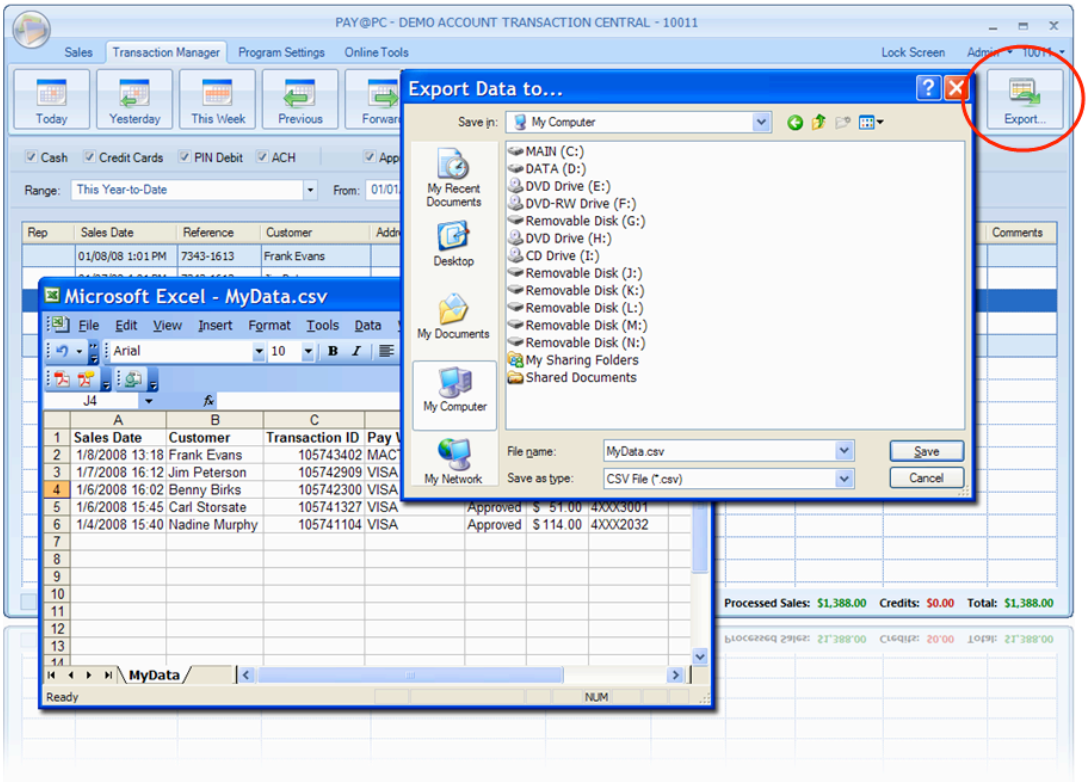
The alternating grid color can be changed by tapping on the color box located left of the sales item count.



Exporting Transaction Data

PAY@PC allows you to export the current data in the Transaction Manager to a comma delimited CSV File. This file can be imported into a number of spreadsheet and accounting packages. Depending on the program you are using to view the imported data, you may need to format the amount column for currency.

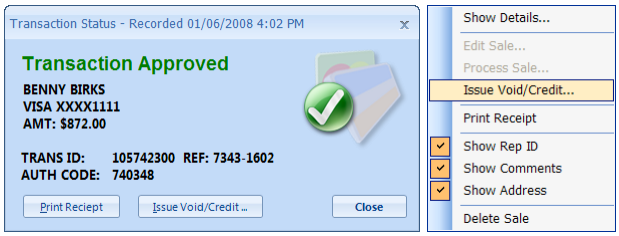
Due to security reasons, full credit and bank account numbers cannot be exported.



Working with a Sales Item

The features that can be accessed for each sales item will depend on its sales type and status.
Double-clicking on a pending sale will open the sales screen for editing and processing sales.
Double-clicking on approved sales will display an Approved Sale screen where voids and credits can be issued for Credit Card sales and receipts can be printed.

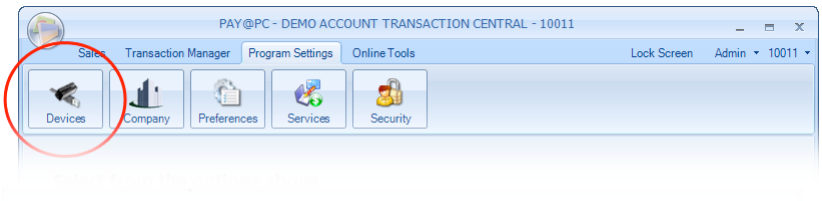
Right-clicking on a sales item will display additional features in the popup menu. Again, depending on the status and sales type, some features will be disabled.



Program Settings

Devices

To open the Device selection screen choose Program Settings > Devices from the PAY@PC ribbon bar.



The Device screen contains the following…

- Card Reader
- Receipt Printer
- Debit Pinpad
- Signature Pad

Card Reader

PAY@PC works with most serial, USB, Keyboard, and Bluetooth 2 and 3 track card readers and has been tested with the following: Pocket Merchant (Serial Model), Pocket Spectrum, SEMTEK Mini Swipe Reader USB (#9473), SEMTEK Keyboard Readers, SEMTEK 9600 Serial Readers. For generic serial card readers, the communications settings for the hardware must be set at 9600,N,8,1.

For the Pocket Merchant and serial readers, select the correct COM Port; use the Test Card Reader link to test the COM Port. For the Pocket Spectrum a COM Port should already be assigned after pairing.

See also:
Installation & Setup: Setting Up Devices: Card Reader
Special Note about using the Pocket Spectrum Bluetooth Card Reader and Printer

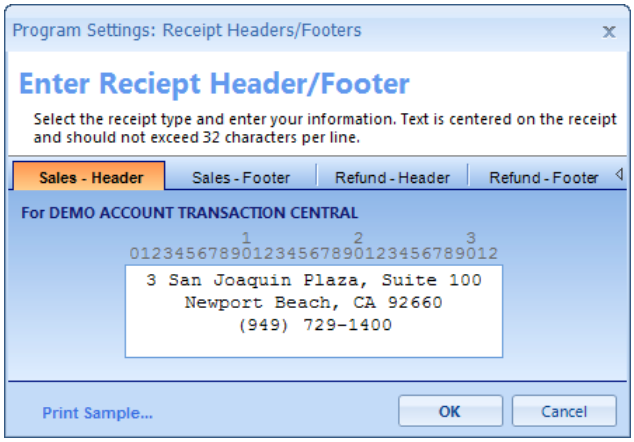
Receipt Printer

The Receipt Printer contains the following sections:

- Setting up receipt Headers and Footers
- Automatically printing approved transactions
- Printing Service Receipts
- Windows Default Printer
- Pocket Merchant / Pocket Spectrum
- Verifone P250
- Samsung Bixolon
- Dymo LabelWriter

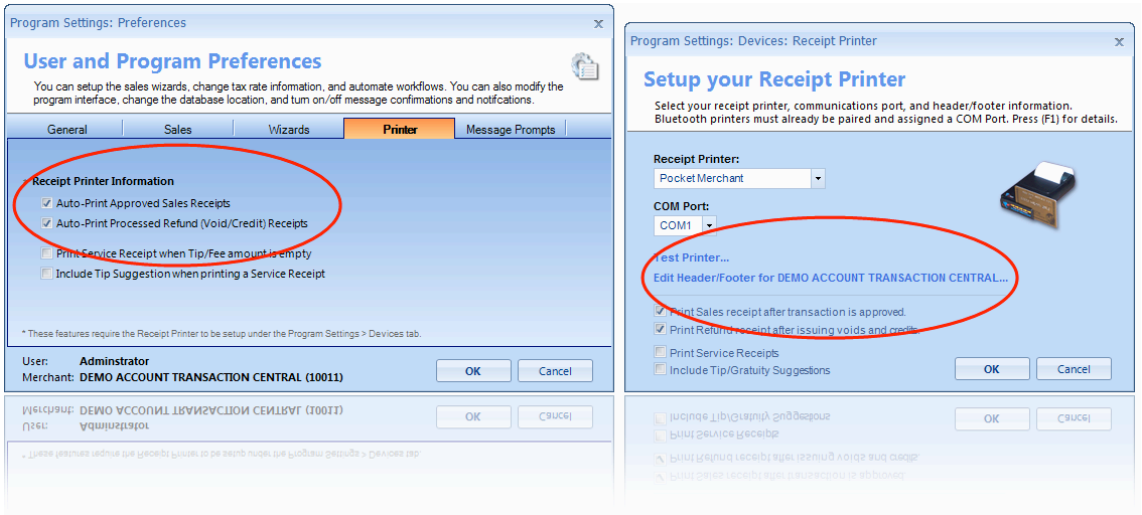
Setting up receipt Headers and Footers

To edit the receipt header and footers, tap on the Edit Header/Footer for… and enter your information as needed. You will need administrator access to do this. It is recommended that the text not exceed 5 lines at 32 characters per line.


Program Settings: Receipt Headers/Footers
Enter Reciept Header/Footer
Select the receipt type and enter your information. Text is centered on the receipt and should not exceed 32 characters per line.
Sales - Header
Sales - Footer
Refund - Header
Refund - Footer
For DEMO ACCOUNT TRANSACTION CENTRAL
1 2 3
01234567890123456789012345678901 2
3 San Joaquin Plaza, Suite 100
Newport Beach, CA 92660
(949) 729-1400
Print Sample...
OK
Cancel

Automatically printing approved transactions

Once a transaction is approved, PAY@PC can automatically print an approved sales receipt (default). This feature can be set from both the Program Settings: Devices: Receipt Printer window and from the Program Settings: Preferences: User and Program Preferences Printer tab.


Program Settings: Preferences
User and Program Preferences
You can setup the sales wizards, change tax rate information, and automate workflows. You can also modify the program interface, change the database location, and turn on/off message confirmations and notifcations.
General
Sales
Wizards
Printer
Message Prompts
Receipt Printer Information
Auto-Print Approved Sales Receipts
Auto-Print Processed Refund (Void/Credit) Receipts
Print Service Receipt when Tip/Fee amount is empty
Include Tip Suggestion when printing a Service Receipt
* These features require the Receipt Printer to be setup under the Program Settings > Devices tab.
User: Adminstrator
Merchant: DEMO ACCOUNT TRANSACTION CENTRAL (10011)
OK
Cancel
Program Settings: Devices: Receipt Printer
Setup your Receipt Printer
Select your receipt printer, communications port, and header/footer information.
Bluetooth printers must already be paired and assigned a COM Port. Press (F1) for details.
Receipt Printer:
Pocket Merchant
COM Port:
COM1
Test Printer...
Edit Header/Footer for DEMO ACCOUNT TRANSACTION CENTRAL...
Print Sales receipt after transaction is approved.
Print Refund receipt after issuing voids and credits
Print Service Receipts
Include Tip/Gratuity Suggestions
OK
Cancel

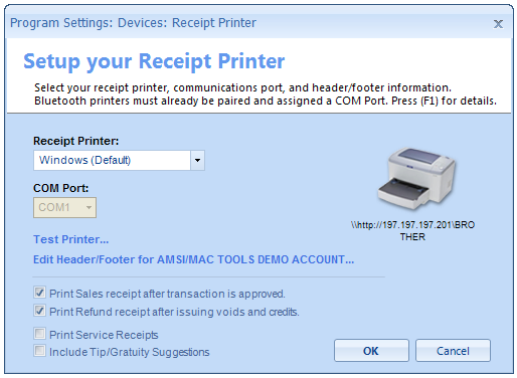
Printing Service Receipts

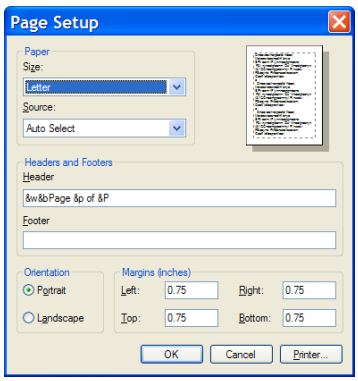
Turn this feature on when you want to print out unapproved receipts that contain a location for the customer to enter a tip. The Include Tip Suggestion option can also be used to display a suggested tip between 15 and 20% of the non-taxable part of the sale. Both these features can be set from the Program Settings: Devices: Receipt Printer window and from the Program Settings: Preferences: User and Program Preferences Printer tab.

Windows Default Printer

PAY@PC prints a full page receipt using the windows default printer. This printer must be graphics capable and uses the Page Layout, Font, and Paragraph properties associated with your Internet Explorer browser.

Thus, to change the borders and margins of the printed receipt on the page, open Internet Explorer and from the menu select File > Page Setup and adjust the margins and orientation accordingly.


Program Settings: Devices: Receipt Printer
Setup your Receipt Printer
Select your receipt printer, communications port, and header/footer information.
Bluetooth printers must already be paired and assigned a COM Port. Press (F1) for details.
Receipt Printer:
Windows (Default)
COM Port:
COM1
\\http://197.197.197.201\BROTHER
Test Printer...
Edit Header/Footer for AMSI/MAC TOOLS DEMO ACCOUNT...
Print Sales receipt after transaction is approved.
Print Refund receipt after issuing voids and credits.
Print Service Receipts
Include Tip/Gratuity Suggestions
OK
Cancel



Pocket Merchant / Pocket Spectrum

The Pocket Merchant printer attaches to an available RS232 serial port on your computer. If you do not have a serial port, there are USB-to-Serial hardware connectors that can be used. Contact your merchant provider or the Pocket Merchant hardware vendor for a list of available connectors. In most cases, you will need to install a third party driver device before attaching the hardware. This driver will create a virtual COM Port on your computer (see the installation instructions for the specific connector that you purchase). You will use this COM Port for setting up your receipt printer.

The Pocket Spectrum is a Bluetooth device that is Bluetooth 1.2 compliant. If your computer has Bluetooth capability, then you will be able to pair the Pocket Spectrum to your computer and assign a COM Port.

There are third party devices that also allow you to use a Bluetooth connection through a USB Serial port. Two devices that have been tested and approved to work with PAY@PC are:

- Kensington (# 33348) USB Bluetooth adaptor
- Belkin (F8T003 ver 2) USB Bluetooth adaptor

When setting up your Bluetooth connection, the following information may be required:

- Pocket Spectrum Passkey: 1000
- Bluetooth Service: Printer or Serial (COM) Device

See the documentation that came with your computer or USB Bluetooth Adaptor on how to setup a Bluetooth connection.

Important Note:
Before setting up a new Bluetooth connection ensure that the Pocket Spectrum is fully charged and reset. If the Pocket Spectrum is not reset, it will not pair properly. See the troubleshooting section for additional information on pairing the Pocket Spectrum (*Troubleshooting: Pairing the Pocket Spectrum with a Bluetooth Device*).

Verifone P250

The Verifone P250 printer must be set to its factory defaults (9600 baud, 7 bit, even parity; see page 5 of the Printer 250 Installation Guide that came with your Verifone Printer). PAY@PC does not support the Verifone P900 printer.

If you do not have a serial port, a USB-to-Serial hardware connector that can be used, however, it is important to make sure the COM Port setting is setup to match the Verifone factory default above.

For technical support on the Verifone printer, visit the Verifone Web site at: http://www.verifone.com.

See also:
http://www.verifone.com
Troubleshooting: Pairing the Pocket Spectrum with a Bluetooth Device

Samsung Bixolon

PAY@PC supports the Samsung Bixolon series of printers.
When using this printer, use the Generic Text-Only Printer Driver that installs with Windows.
You may also use the Bixolon-specific printer driver that comes with the printer, but there are no additional benefits to using this driver.

See also:
Trouble-Shooting: Installing the Windows Generic Text Only Printer Driver

Dymo LabelWriter

PAY@PC supports the DYMO LabelWriter series of printers.
To use this printer, install the software application that came with the printer. The software version for this printer must be version 7.8 or greater. Go to the DYMO Web Site to make sure you have the most recent version of this software.

Debit Pinpad

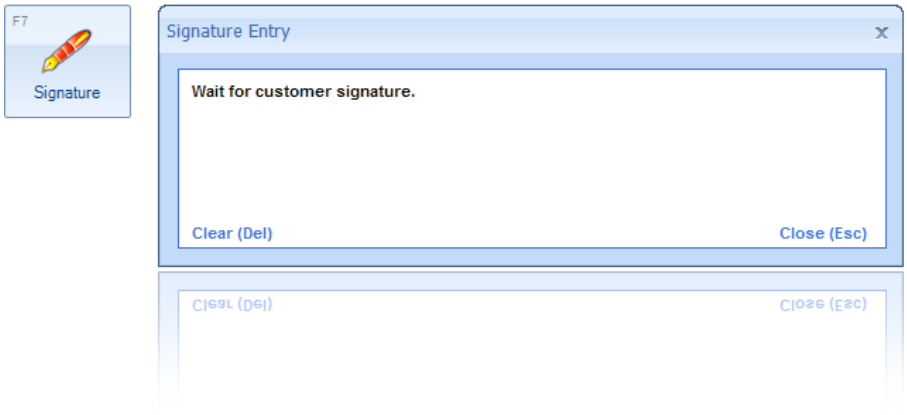
PAY@PC uses the Verifone 1000SE Pinpad for debit transactions (ATM/Debit Sales).
In order process debit transactions, a REG KEY must also be setup with your account.
To obtain a REG KEY, contact your merchant representative or request a REG KEY from the Program Settings: Company Information screen.

See also:
Setting up Devices: Encrypted Pinpad
Company Information: Updating Company Information

Signature Pad

PAY@PC works with the SigGem and SigLite 1x5 Topaz HSB Series signature pads which are available from your Merchant Provider. The recommended models are the SigLite 1x5 T-S461-HSB and the SigGem T-LBK 462-HSB which has a backlit LCD display that prompts the user for signature input.

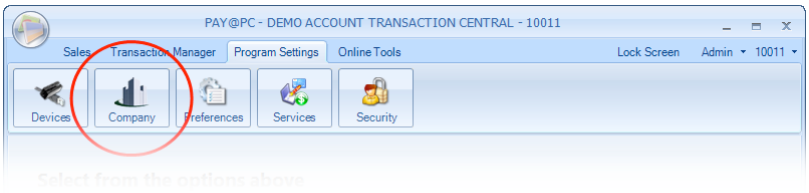
When the signature pad is enabled, you can setup PAY@PC to automatically prompt for the signature during sale entry. This feature is available in the Program Settings: Preferences: User and Program Preferences Wizard tab. The signature input prompt can also be shown by clicking on the Signature workflow button for Credit Card sales.



See also:
Setting up Devices: Signature Pad
Program Information: Preferences: Wizards

Company Information

To open the Company screen select Program Settings > Company from the PAY@PC ribbon bar.
You must be logged in as the administrator to access this screen.



The Company screen allows you to perform the following tasks:

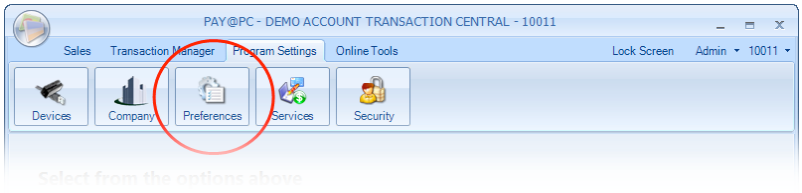
- Change the Company/DBA Name
- Change the Company Address and telephone number
- Change the REG Key (registration key)
- Update the Receipt Headers and Footers with this information

This information will appear on your main start up screen and when you lock PAY@PC.

See also:
Sales Screen: Locking the Screen

Preferences

To open the Preferences screen select Program Settings > Preferences from the PAY@PC ribbon bar.



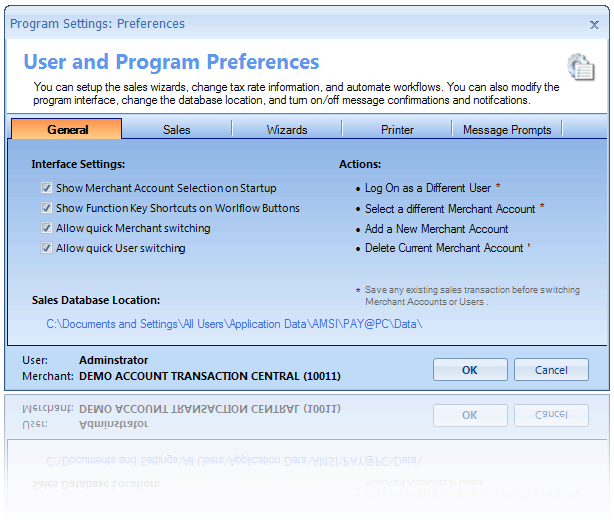
The Preferences screen contains the following tabs…

- General
- Sales
- Wizards
- Printer
- Message Prompts

General

The General tab contains three groups of features.

- Interface Settings
- Actions
- Sales Database Location


Program Settings: Preferences
User and Program Preferences
You can setup the sales wizards, change tax rate information, and automate workflows. You can also modify the program interface, change the database location, and turn on/off message confirmations and notifications.
General
Sales
Wizards
Printer
Message Prompts
Interface Settings:
Show Merchant Account Selection on Startup
Show Function Key Shortcuts on Workflow Buttons
Allow quick Merchant switching
Allow quick User switching
Actions:
Log On as a Different User *
Select a different Merchant Account *
Add a New Merchant Account
Delete Current Merchant Account *
* Save any existing sales transaction before switching Merchant Accounts or Users .
Sales Database Location:
C:\Documents and Settings\All Users\Application Data\AMSI\PAY@PC\Data\
User: Adminstrator
Merchant: DEMO ACCOUNT TRANSACTION CENTRAL (10011)
OK
Cancel

Interface Settings

Interface settings allow you to display or hide the Merchant Account Selection screen when logging on each time you start the software. If you do not need to use the test account and only have one merchant account, you may want to turn this feature off. The same is true for Quick Merchant Switching and Quick User Switching (if you are the only user setup to use the program). If you never use keyboard shortcuts, then you can turn the Show Function Key Shortcuts off.

Actions

When using the action keys, it is recommended that you first save any sales transaction that you have been working on. The same is true when you lock the screen, since changing merchant accounts or logging in as a different user will automatically switch to a new sales screen. Some of these actions are not available unless you are logged on as the administrator (Add/Delete Merchant Account, Activate Software, & View Log Files).

You can also Manage your activation keys from this section.

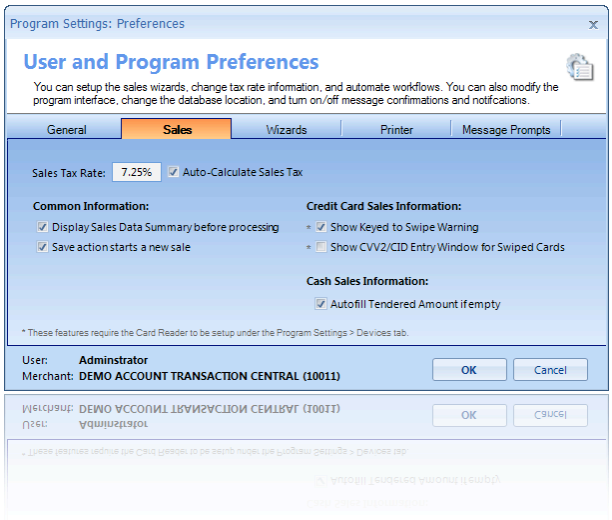
Sales Database Location

This feature only appears if you are logged on as the administrator.
By default the transaction database goes into the Application Data directory for all users. This is a specific location on computers that contain the Windows XP, Server 2003, or Vista operating systems. If you need to change the location of the database (i.e., you are using PAY@PC on more than one computer and have a shared sales database) you can change to location by clicking on this link and selecting an existing database. You will need to know the user name and password for the database that you want to use. You will also need to have read/write access to the database for all users logged to the computer that can use PAY@PC (see your system administrator for details). When changing the database, you will need to restart PAY@PC for changes to take affect.

Sales

The Sales tab contains the following features…

- Sales Tax Preferences
- Common Sales Preferences
- Credit Card Specific Preferences
- Cash Sales Specific Preferences


Program Settings: Preferences
User and Program Preferences
You can setup the sales wizards, change tax rate information, and automate workflows. You can also modify the program interface, change the database location, and turn on/off message confirmations and notifcations.
General
Sales
Wizards
Printer
Message Prompts
Sales Tax Rate:
7.25%
Auto-Calculate Sales Tax
Common Information:
Display Sales Data Summary before processing
Save action starts a new sale
Credit Card Sales Information:
Show Keyed to Swipe Warning
Show CVV2/CID Entry Window for Swiped Cards
Cash Sales Information:
Autofill Tendered Amount if empty
* These features require the Card Reader to be setup under the Program Settings > Devices tab.
User: Adminstrator
Merchant: DEMO ACCOUNT TRANSACTION CENTRAL (10011)
OK
Cancel

Sales Tax Preferences

Use this field to enter the sales tax for you area. PAY@PC only supports one sales tax. If you have both a State and Federal sales tax, add both taxes together in this area. You can also choose to automatically calculate the sales tax for items that you enter on the sales screen. Even if the option is off, you can still add the sales tax from the number pad or by selecting Item is Taxable on the sales screen.

Common Sales Preferences

The Display Sales Data Summary will display a summary of the sales transaction before you send it to the processing bank. This is an added security feature to make sure that all the information and sales amount were entered correctly.

The Save Action Starts New Sale will automatically start a Sales Wizard that is associated with the Sales type selected from top sales ribbon.

Credit Card Specific Preferences

Due to Payment Card Industry (PCI) Compliance Standards, credit cards that are swiped (scanned) cannot be stored with their swiped data. Thus, when you save a swiped credit card sale before processing, it will automatically be converted to a keyed rate. Swiped rates get a slightly better rate over keyed rates, thus the Show Keyed to Swipe Warning will indicate that this change will occur, which in turn, will alter the merchant bank's rate charge.

For added security, the CVV2/CID Entry prompt can appear before processing a sale. The CVV2/CID is not transferred to the merchant gateway, nor is it stored. This is only a security prompt to help you visually inspect a credit card before processing.

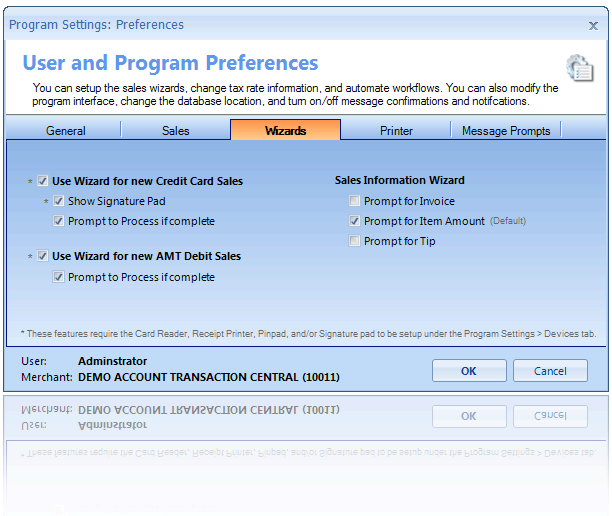
Cash Sales Specific Preferences

Use the Autofill Tendered Amount if Empty option if you usually do not enter the exact amount of cash tendered during a cash sale transaction.

Wizards

The Wizards tab contains wizard information for:

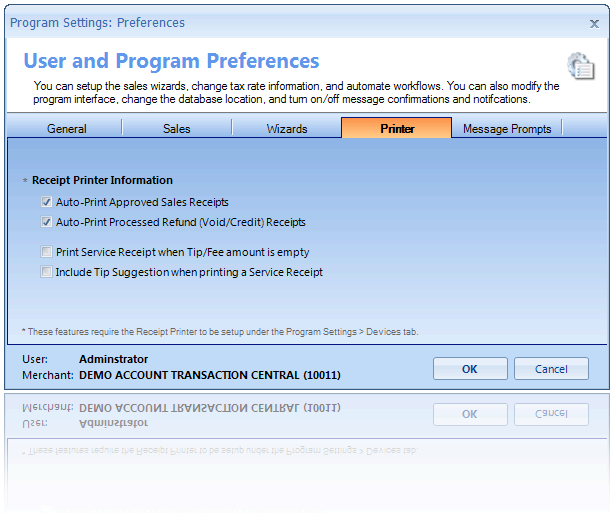
- Common Sales Prompts
- Credit Card Sales Prompts
- AMT Debit Sales Prompts


Program Settings: Preferences
User and Program Preferences
You can setup the sales wizards, change tax rate information, and automate workflows. You can also modify the program interface, change the database location, and turn on/off message confirmations and notifications.
General
Sales
Wizards
Printer
Message Prompts
Use Wizard for new Credit Card Sales
Show Signature Pad
Prompt to Process if complete
Use Wizard for new AMT Debit Sales
Prompt to Process if complete
Sales Information Wizard
Prompt for Invoice
Prompt for Item Amount (Default)
Prompt for Tip
* These features require the Card Reader, Receipt Printer, Pinpad, and/or Signature pad to be setup under the Program Settings > Devices tab.
User: Adminstrator
Merchant: DEMO ACCOUNT TRANSACTION CENTRAL (10011)
OK
Cancel

These options display various prompts that can provide less mouse clicking.

Printer

The Printer tab contains the same information that can be found on the Printer screen of the Device Setup option.


Program Settings: Preferences
User and Program Preferences
You can setup the sales wizards, change tax rate information, and automate workflows. You can also modify the program interface, change the database location, and turn on/off message confirmations and notifications.
General
Sales
Wizards
Printer
Message Prompts
Receipt Printer Information
Auto-Print Approved Sales Receipts
Auto-Print Processed Refund (Void/Credit) Receipts
Print Service Receipt when Tip/Fee amount is empty
Include Tip Suggestion when printing a Service Receipt
* These features require the Receipt Printer to be setup under the Program Settings > Devices tab.
User: Adminstrator
Merchant: DEMO ACCOUNT TRANSACTION CENTRAL (10011)
OK
Cancel

If you have a printer attached and continually on for processing sales, you may want to set the Auto-Print feature to on.

The Service Receipt option will print a Service Receipt with an area for the customer to enter a tip – if the Tip/Fee amount is empty on the sales screen.

To print a service receipt:

1. Turn this feature on.
2. Start a sale.
3. Enter your sales information.
4. Leave the Tip/Free area empty, and
5. Select the Print workflow button before processing the sale.

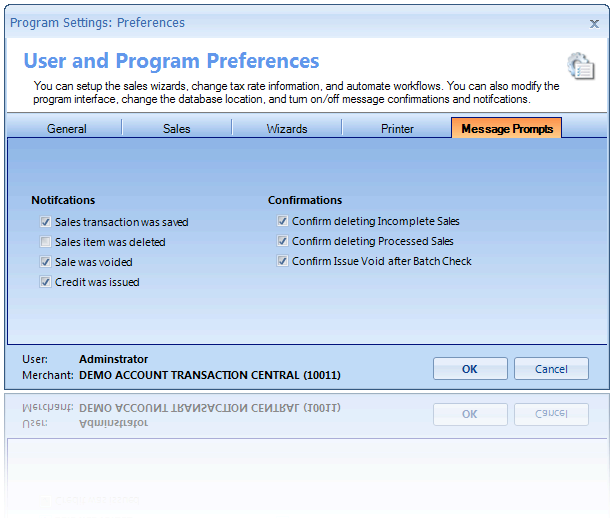
You also have the option to include a Tip Suggestion when printing a service receipt (Tip Suggestion percentages cannot be modified).

See also:
Installation and Setup: Setting Up Devices: Receipt Printer
Program Settings: Devices: Receipt Printer

Message Prompts

The Message Prompts tab contains both notifications and confirmations.

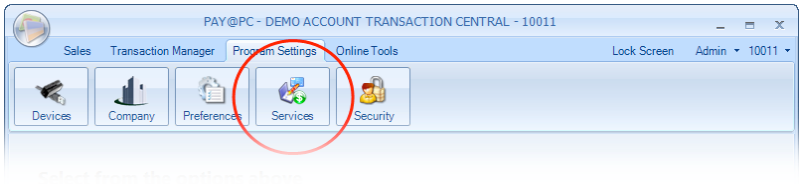
Notifications are useful for indicating that a sales item was voided or a credit was issued, since it is possible that modified transactions may no longer appear in the transaction manager depending on how the Sales Type and Date Range criteria are setup.


Program Settings: Preferences
User and Program Preferences
You can setup the sales wizards, change tax rate information, and automate workflows. You can also modify the program interface, change the database location, and turn on/off message confirmations and notifcations.
General
Sales
Wizards
Printer
Message Prompts
Notifcations
Sales transaction was saved
Sales item was deleted
Sale was voided
Credit was issued
Confirmations
Confirm deleting Incomplete Sales
Confirm deleting Processed Sales
Confirm Issue Void after Batch Check
User: Adminstrator
Merchant: DEMO ACCOUNT TRANSACTION CENTRAL (10011)
OK
Cancel

See also:
Transaction Manager: Selecting and Sorting by Sales Criteria

Services

To open the Services screen select Program Settings > Services from the PAY@PC ribbon bar.

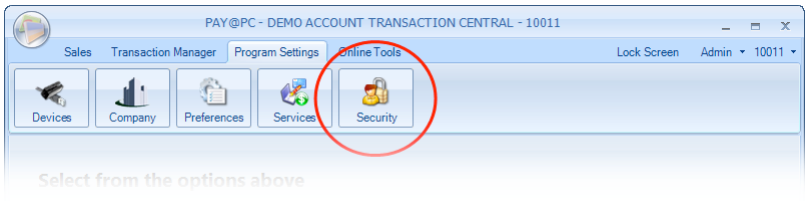


The service screen allows you to restrict the type of sales and credit cards that you can use in PAY@PC. It is recommended that you only use the Sales Types that have been added to your merchant account (Cash and Credit Card sales are always set on by default).

If your merchant account is only setup to accept VISA and Mastercard, then leave the other credit cards unchecked. While you may know what credit cards you accept, one of the other users (employees) working with PAY@PC may not. If an unaccepted credit card is swiped or keyed, then a warning prompt will appear.

Security

To open the Security screen select Program Settings > Security from the PAY@PC ribbon bar.



The User and Program Security screen is where you can change your (administrator access) password and add/remove/modify users. You must be logged on as the administrator in order to access this screen.

Add users if you have more than one person using the program and you want to:

- Keep track of their sales by assigning a Rep ID.
- Limit their access to different features of the program.
- Limit their ability to process voids and credits and/or delete sales items

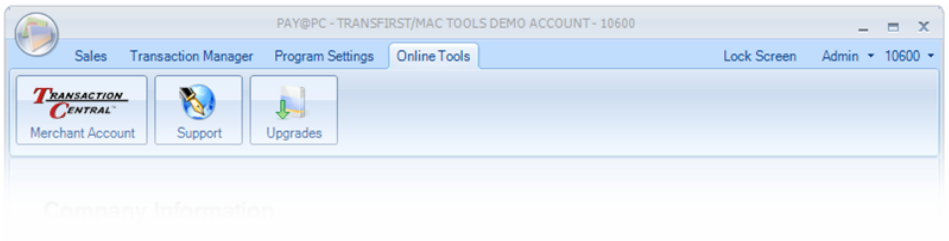
Privilege Definitions:

G,D,S / VC,D,X,VS
Access for Program Settings Screen / Access to Transaction Manager Features
G: General Settings, D: Device Settings, S: Service Settings
VC: Voids Credits, D: Delete completed sales, X: Export sales data, VS: Sales summaries are visible

See also:
Tutorials: Adding Removing Users

Online Tools

The Online Tools ribbon contains links to various merchant processing and internet-based pages.
You must be connected to the internet in order to access these tools.
The type of tool(s) available will depend on your Merchant Account.



The Online tools ribbon currently contains:

- Transaction Central
- Support
- Upgrades

Transaction Central

Transaction Central is your Online Merchant Processing System.
For detailed sales information, issuing advanced credits, setting up recurring billing, generating reports, or determining your batch closures, Transaction Central is your virtual terminal.

To log into Transaction Central:

1. Click on the Transaction Central Merchant Account button from the Online Tools ribbon.
2. Log on using the same Merchant ID used for setting up PAY@PC.

Once you are logged in, you can get detailed reports, check batch closures, and download data from different queries that you generate.

Support

Use this link to go to the PAY@PC Online support site. From here, you can view additional documentation, file bug reports, and check for updates.

Upgrades

From time-to-time is may be necessary to update PAY@PC when enhancements are made or when the latest security concerns and vulnerability alerts require that we modify existing code. As such, we recommend that you check for updates to the software at least once a month. Should an update be available, you will be notified through the update mechanism and asked to download and install the update.

Note that all updates are digitally signed by **Advanced Merchant Solutions, Inc**.

Tutorials

The following tutorials are included…

- Processing a Sales Transaction
- Issuing a Void or Credit
- Adding/Removing Users

Processing a Sale Transaction

Introduction

Whether you process cash, credit, ACH, or ATM/Debit sales, all sales involve three steps:

1. Entering Sales Data
2. Processing the Sale
3. Getting an Approval and Printing a receipt

Below the following tutorials are covered…

- Processing a Credit Card
- Processing an ATM/Debit Card

Entering Sales Data

Once all the information is entered for a particular sales type, tap on the Process Sale button.
If the New Sales Wizard is used and the Prompt to Process if Complete option is turned on (default) under the User and Program Settings Wizard Tab, then confirmation prompt appears, allowing you to process the sale.

Processing the Sale

With the exception of cash sales, a secured internet connection is required to obtain an authorization code for approved transactions. (See the PA-DSS Implementation Guide on how to setup your system to be PCI Compliant).

Getting an Approval and Printing a receipt

Once the sale is completed, the approval screen appears. If the Auto-Print Approved Sales Receipts option is turned on (default) under the User Program and Settings Printer Tab, a sales receipt will also be printed.

If you do not have enough information to process the sale, it can usually be saved and resubmitted at a later time by using the Transaction Manager.

Please note that **PAY@PC does not store credit card numbers** at anytime. Thus, any credit card sales transaction that is saved will be marked as incomplete and you will need to re-enter the card number before processing the sale.

Processing a Credit Card Sale

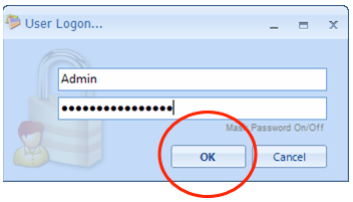
This tutorial assumes the following:

- Your Merchant account is setup.
  This example uses Account 10011. You can use a test account or your live account. If you use the test account, the credit card will obtain an authorization code of 999999 but will not be charged.

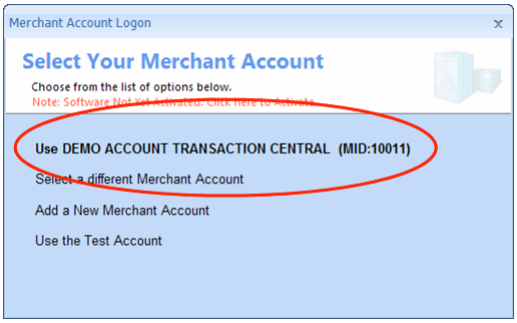
- If you are not using the Test Account, you have already activated the software.
- You have already setup your card reader, receipt printer, and signature pad
- You have a connection to the internet.

1. Start PAY@PC.

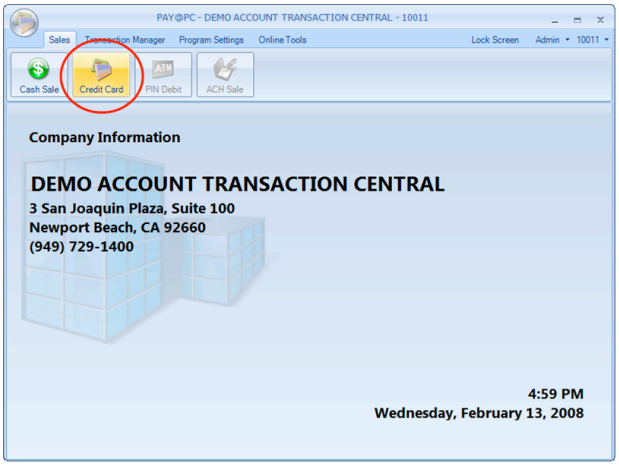
2. Enter your Logon infmoration and click OK to log on.



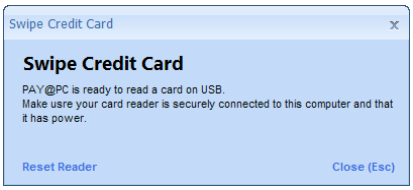
3. Select your account (i.e., DEMO ACCOUNT in this example) or the Test Account.


Merchant Account Logon
Select Your Merchant Account
Choose from the list of options below.
Use DEMO ACCOUNT TRANSACTION CENTRAL (MID:10011)
Select a different Merchant Account
Add a New Merchant Account
Use the Test Account

4. Click the Credit Card button on the top ribbon.



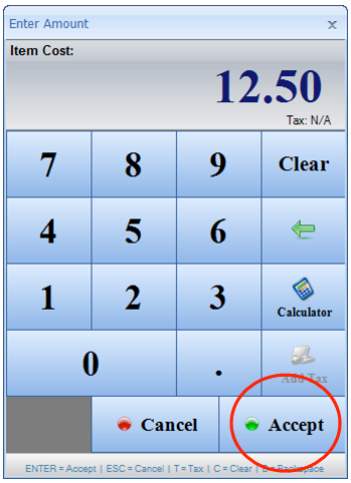
5. Swipe your credit card.
   If you are keying the information in, click on the cancel button and enter the card number.


Swipe Credit Card
Swipe Credit Card
PAY@PC is ready to read a card on USB.
Make usre your card reader is securely connected to this computer and that it has power.
Reset Reader
Close (Esc)

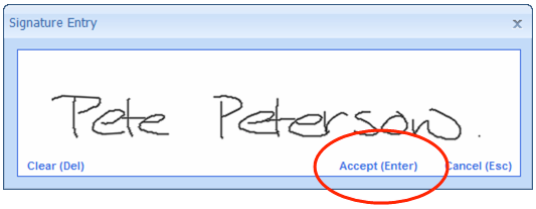
   While test cards will not be approved on your live account, some sample test cards numbers that you can use with test account (10600) are:

   - Visa 4111111111111111
   - MasterCard 5555555555554444
   - American Express 378282246310005
   - Discover 6011111111111117

6. After a successful read, the number pad appears.
   Enter an amount of $12.50 (by clicking on the buttons or using the keypad).
   Press the Enter key or click on the Accept button.

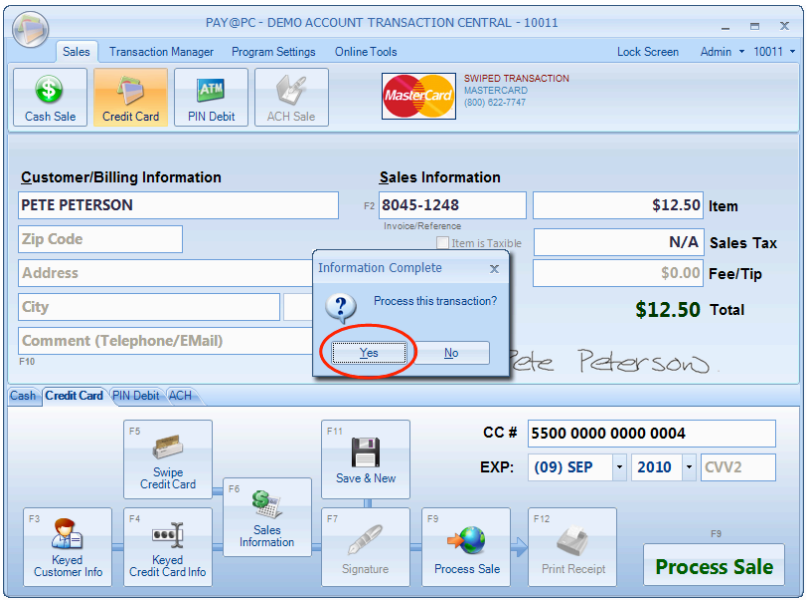


7. After entering an amount, the signature pad appears.
   Sign using the pad and press the Enter key or click on the Accept button.

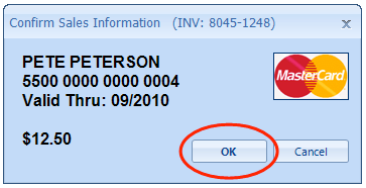


   At this point, all the required information has been added and you will be promoted to process the sale.

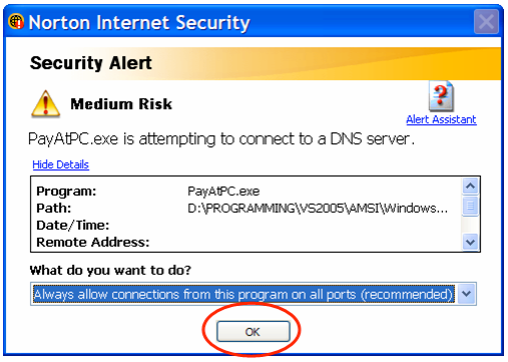
8. If the Information Complete message appears, click Yes.
   Click No to add additional information such as an address or comments.



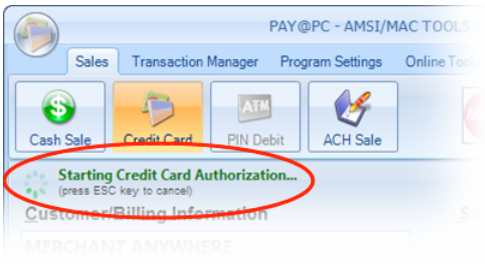
9. If the confirmation screen appears, verify that the information and click OK.



Depending on what internet security you have on your computer, you may be prompted with a security alert, such as the one shown below. PAY@PC sends all information through a highly secured encrypted connection to the processing back. Thus, click OK to always allow connections to PAY@PC or set up your Internet security options / firewall independently to allow a connection.



10. PAY@PC will display a message indicating that it is connecting with the bank to authorize the sale. A successful authorization will display the approval screen and print a receipt to your printer.



11. Click Close when completed.
    To process a new sale, simply click on the Credit Card button on the top Sales ribbon.

    Congratulations, you have just made your first sale!

Processing an ATM/Debit Card Sale

PAY@PC allows you to process debit card using an encrypted Pinpad.
In order to follow this tutorial, it is assumed that…

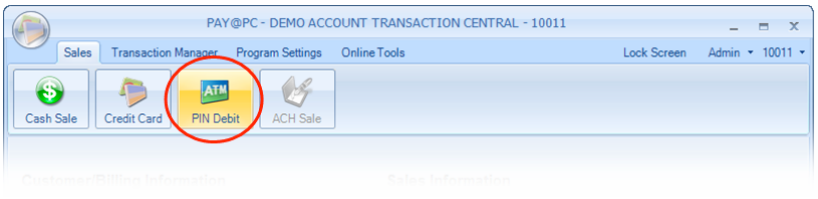
- Your Merchant account is setup to accept PIN Debit.
  The test account will not work with PIN Debit.

- You have added your REG Key.
  A REG Key is required to use PIN Debit.
  To request or enter your REG Key, go the Program Settings > Company Information screen.

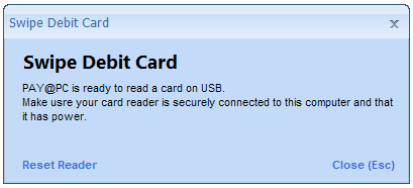
- You have already setup your card reader, receipt printer, and VeriFone 1000SE Pinpad
- You have a connection to the internet.
- You are already logged in to your merchant account.

1. Click the Sales menu item if the sales ribbon is not showing.
   If the Swipe Credit Card screen appears, press the Esc key or click Close (Esc).

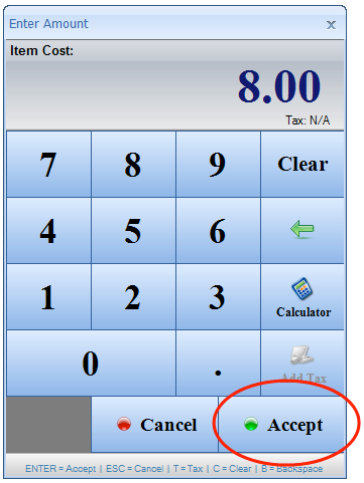
2. Click the PIN Debit button.
   If the PIN Debit button is disabled, you must enable it from the Services screen.
   Program Settings > Services > Sales Methods Accepted > ATM/PIN Debit



3. Swipe the debit card.


Swipe Debit Card
Swipe Debit Card
PAY@PC is ready to read a card on USB.
Make usre your card reader is securely connected to this computer and that it has power.
Reset Reader
Close (Esc)

4. After a successful read, the number pad appears.
   Enter an amount of $8.00 (by clicking on the buttons or using the keypad).
   Press the Enter key or click on the Accept button.



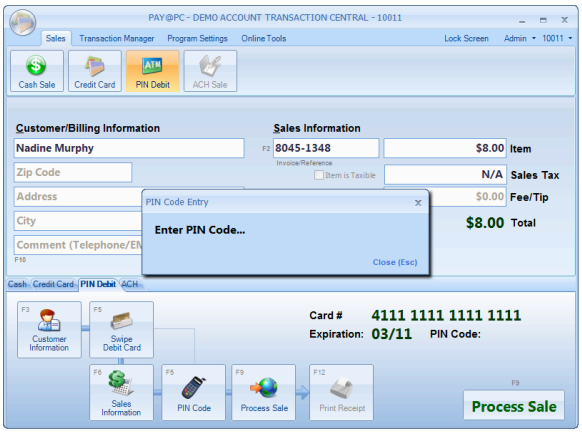
5. After entering an amount, the Enter Pin Code window appears.
   Have the customer enter their PIN using the Pinpad.
   Once the customer presses the green Return key, all the required information has been added and you will be prompted to process the sale.

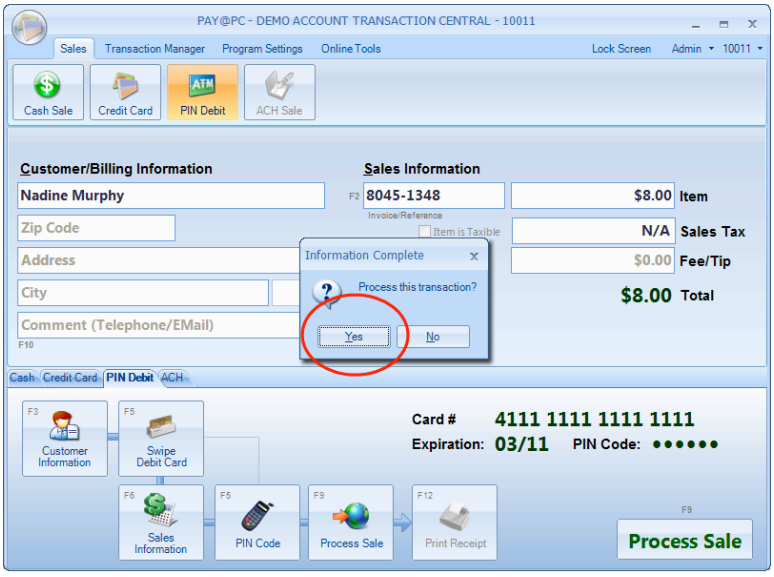
   If the customer makes a mistake, they can press the yellow Backspace key or the red Cancel key to clear their entry and start over. Otherwise you can press the Escape key or click on the Close link.

The screen below shows the Information Complete message with all needed debit card information. To process the sale, click the Yes button. Click No to add additional information such as an address or comments.

If the customer makes a mistake entering their PIN, you can click the Swipe Debit Card or PIN Code workflow buttons (or press F5) to re-enter the card information. The debit card must be swiped each time before entering the PIN code.

Note: You cannot save an ATM/PIN Debit sale for later processing.





6. If the confirmation screen appears, verify the information and click OK.

7. PAY@PC will display a message indicating that it is connecting with the bank to authorize the debit transaction. A successful authorization will display the approval screen and print a receipt to your printer.

8. Click Close when completed.

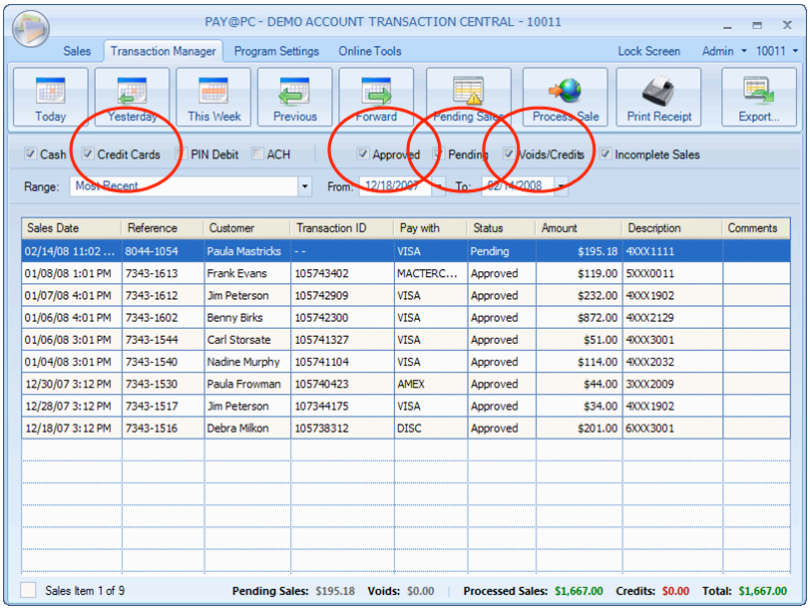
Issuing a Void or Credit

In some cases you will need to issue a void or credit to the customer.
A void can usually be issued the same day. A credit can only be issued after the sales transaction is settled by the processing bank (PAY@PC transactions are automatically settled between 11 - 12 PM PST)*.

There are two ways to issue voids and credits. One way is to log into your Transaction Central account online, locate the sale and issue a void/credit through the Internet. The second way is to locate the sale in the PAY@PC Transaction Manager. By issuing a void or credit from the Transaction Manager, you can also print a void or credit receipt. Once a void or credit is issued, you can no longer apply any actions to that sale except to print a receipt.

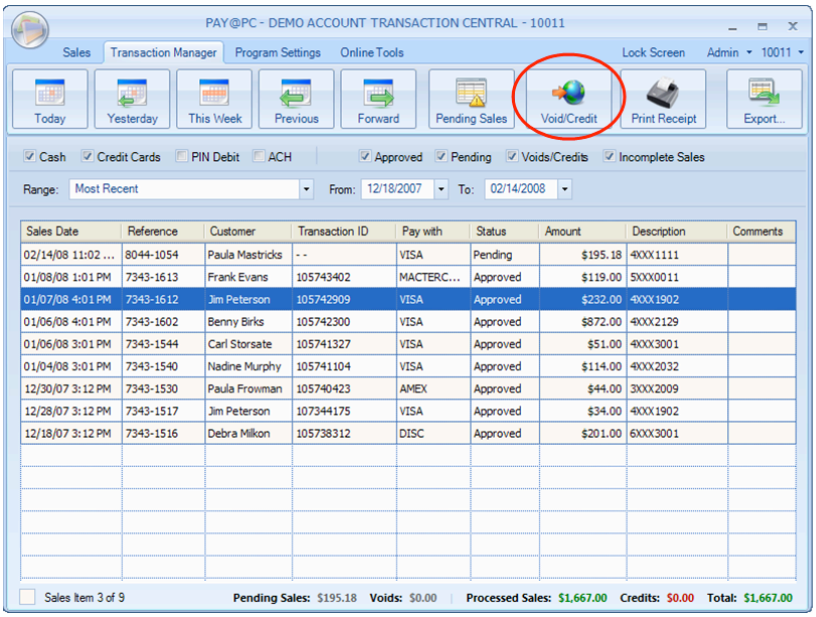
This tutorial assumes that you have already processed at least one credit card sale that was approved.

1. Click on the Transaction Manager menu item.
   If this is the first time you are entering Transaction Manager, then the range is set to Most Recent.
   Make sure that the Credit Cards item is checked on and that Approved, Void/Credit, and Pending sales are also checked on.

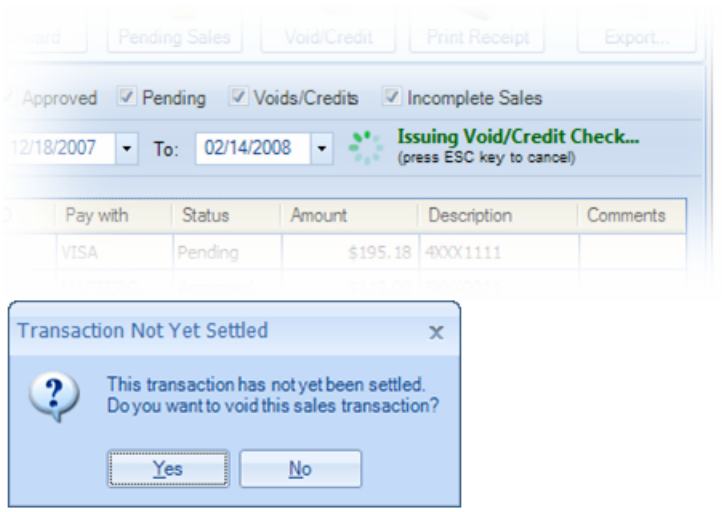


* Note: Sales processed into Test accounts never batch out. Thus, a credit can ever be issued.

2. Select an approved sale.
   When an approved sale is selected, a Void/Credit button appears left of the Print Receipt button.
   Selecting a pending sale will display the Process Sale button.

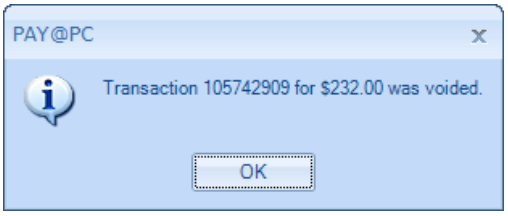


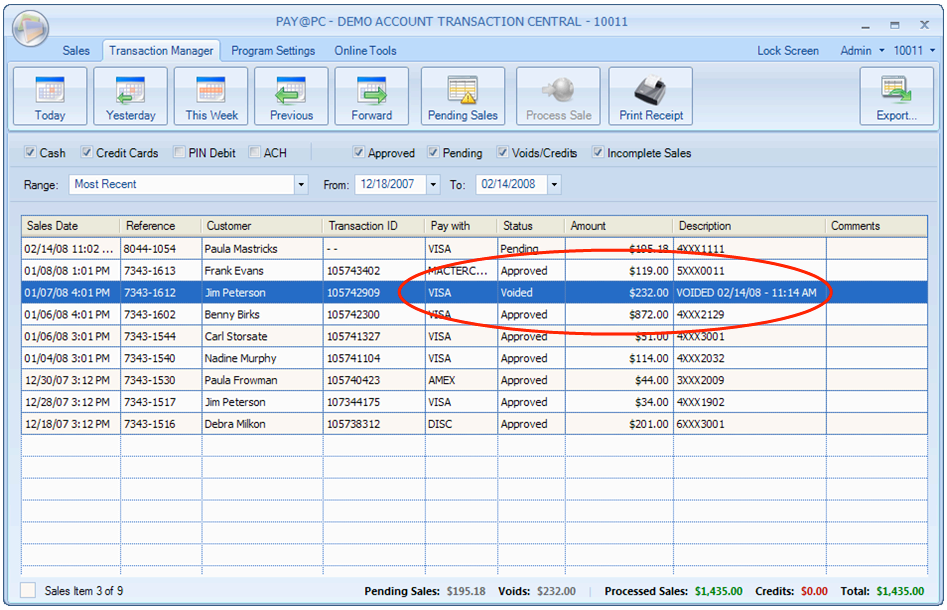
3. Click on the Void/Credit button.
   PAY@PC will contact the gateway and determine the status of the transaction.
   If the transaction was settled, you can issue a full or partial credit. An unsettled transaction (as in the example here) can be voided.

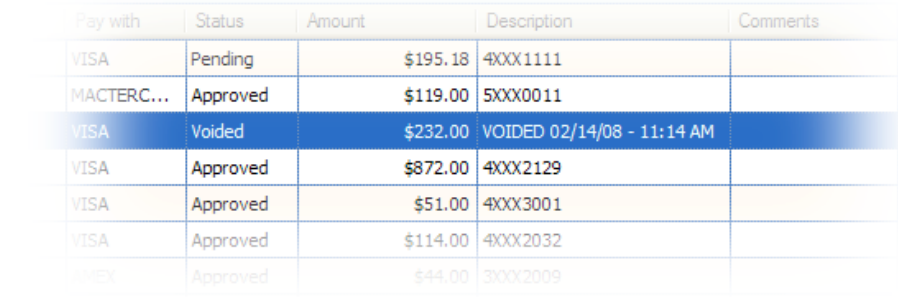


4. Select Yes.
   If your transaction was already settled, issue a full credit.

5. If the Confirm Issue Void after Batch Check notification prompt is set on from the Program Settings > Preferences > Message Prompts tab, the message below will appear. A refund receipt may also automatically be printed if the Auto-Print Processed Refund feature is set on under the Program Settings > Preferences > Printer tab.







The sales item description is updated with the voided date and time.

Adding/Removing Users

In this tutorial you will add two users (Dick and Jane) with different privileges.
You must have administrator access to add and remove user.

In addition, it is recommended that you create a Full Access account even if you are the only user of the software. You should use the Full Access account instead of the Administrator account when processing sales. To set up this account, follow the tutorial below, enter your name, select All Accounts for the Restricted Account and select Full Access for step 6.

Dick is a student that comes in to help with sales on the weekends. He should only have access to one account and not be allowed to issue voids or credits.

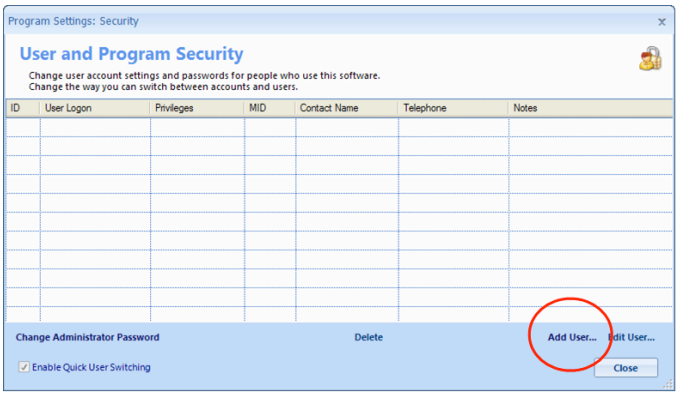
Jane is the weekend manager. She can issue voids and credits. She can also use different merchant accounts, but she is not allowed to change company information or to modify any of the device settings (since everything is already setup and working properly).

In addition, you want to be able to monitor their individual sales online by assigning each of them a Rep ID.

1. Start PAY@PC.

2. Open the User and Program Security screen.
   Program Settings > Security.

3. Click Add User….

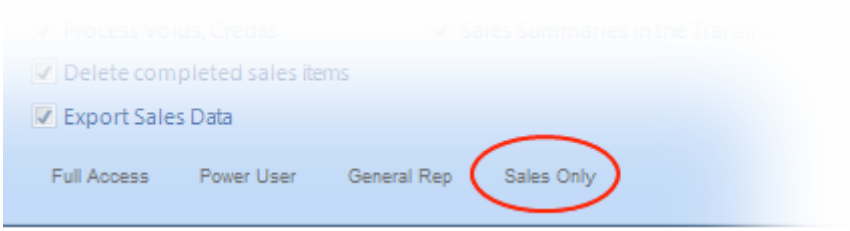


4. Enter the following information:

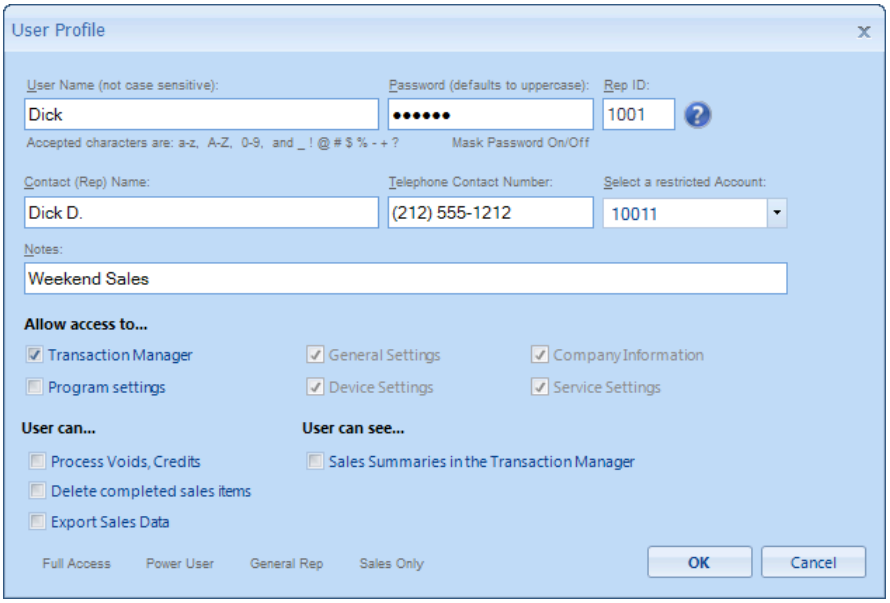
   User Name: Dick
   Password: dick1234
   Rep ID: 1001
   Contact Name: Dick D.
   Telephone Number: (212) 555-1234

5. Select a restricted account from the drop down list (i.e., 10011).
   If this example, when Dick logs on, he will automatically be using account 10011. Furthermore, he will not be able the change the account using the quick switch menu.

6. Click on the Sales Only item.



This quickly changes the security settings to the correct restrictions.
You can still over ride any of the restrictions by choosing them individually.
Your screen should now look similar to the one displayed below.



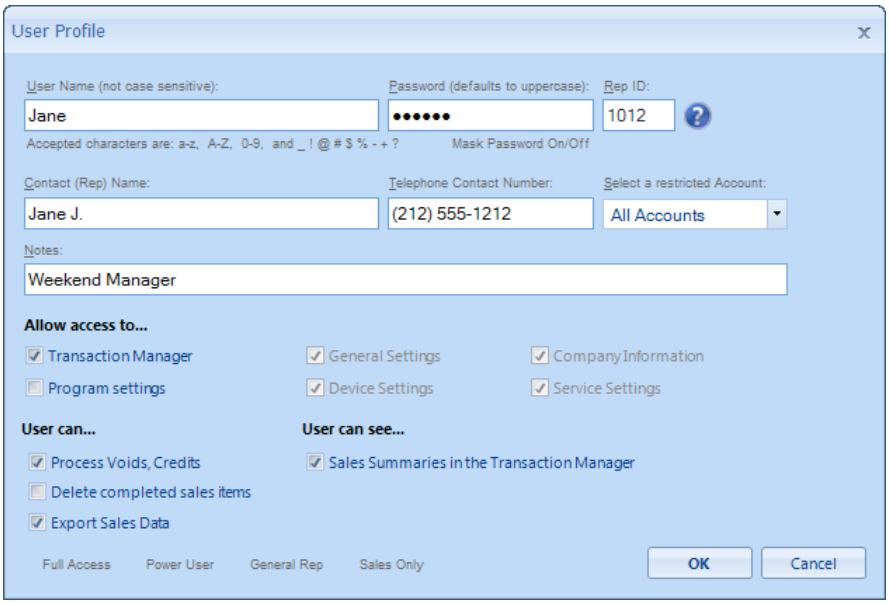
7. Click OK.

8. Add a second user using the following information:

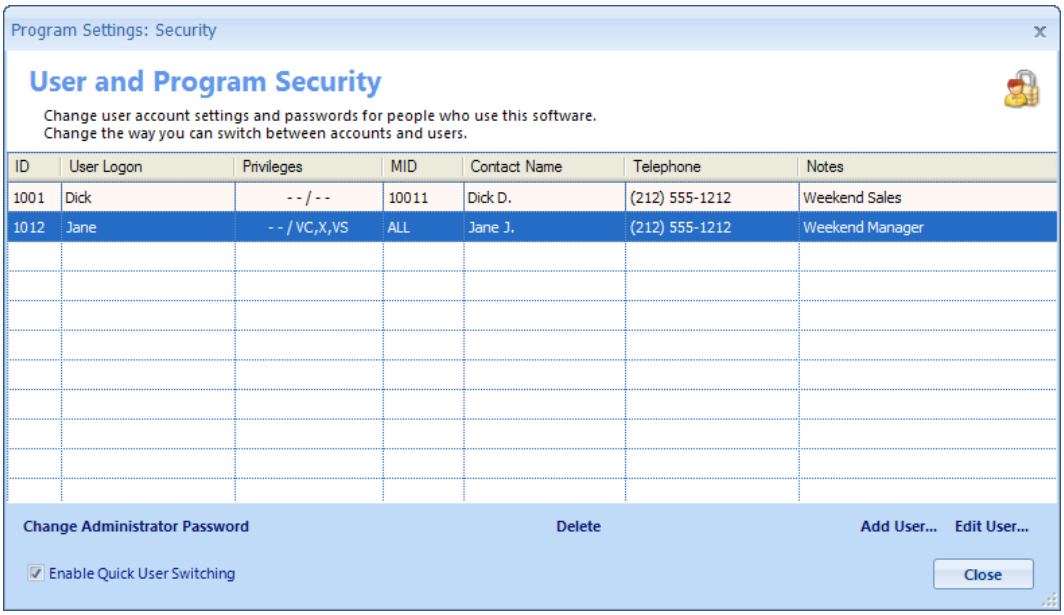
User Name:	Jane
Password:	jane1234
Rep ID:	1012
Contact Name:	Jane J.
Telephone Number:	(212) 555-1234

9. Make sure the Restricted Account is set to All Accounts.

10. Click on General Rep.
    Your screen should look similar to the one displayed below.



11. Click OK.
    You should now have two users.
    Note: If you already setup a Full Access account for yourself, you will see 3 users.



    See the section Program Settings: Security for a description of the Privileges displayed.

12. Click Close.
    Then try logging in as either Dick or Jane and see how the security features work.

Trouble-Shooting

Pairing the Pocket Spectrum with a Bluetooth Device

To correctly pair the Pocket Spectrum, follow these steps:

1. Full charge the Pocket Spectrum.
2. Make sure there is paper in the Pocket Spectrum.
3. If you are using a laptop, make sure it is plugged in or fully charged.

4. Reset the Pocket Spectrum by:

    a. Turning on the Pocket Spectrum.

    b. Turning over the Pocket Spectrum and press the reset button using a thin paperclip or pin – the small hole next to the battery compartment. This will turn off the Spectrum.

    c. Pressing and Holding the On button for 3 seconds.

    Once the diagnostic sheet prints out, the spectrum is ready for pairing

5. Start the pairing process by following the instructions that came with your computer or Bluetooth adaptor. Note: Make sure to search for all devices.

6. Select the Pocket Spectrum from the list of devices.
   The device name (Bluetooth ID) should start with MSP.
   The actually name will be printed on your diagnostic sheet next to B/T ID.

7. Enter the Passkey 1000

8. Enter the service and assign a COM Port for the outgoing connection.
   If an outgoing COM Port is already assigned, use that COM Port in PAY@PC.
   If the Bluetooth Printer is not connected, then PAY@PC will not display the COM Port in the Device Printer or Card Reader Settings.

Installing the Windows Generic Text Only Printer Driver

To install the Generic Text Only Driver in Windows XP, follow these steps:

1. Open the Control Panel.

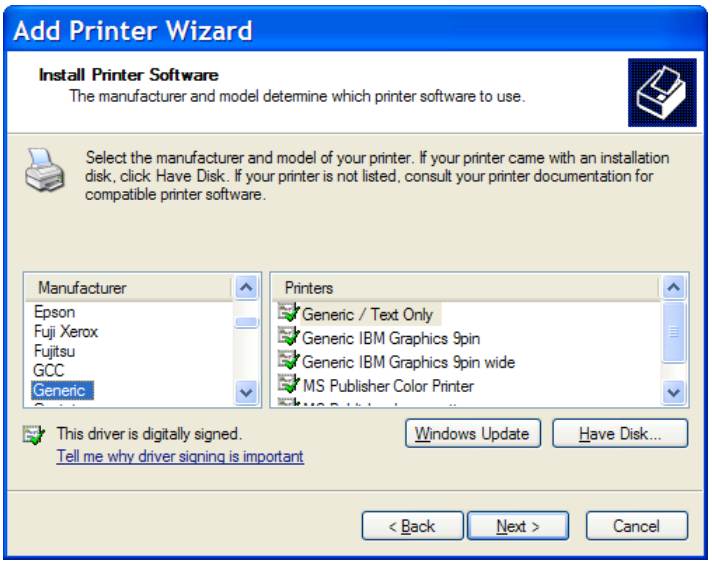
2. Switch to Category View.
3. Pick the category: Printer and Other Hardware.
4. Pick the task: Add a Printer.

5. Click Next in the Add Printer Wizard.

6. Select Local Printer and turn off Automatic detection, then click Next.

7. Select the port you will be using (for example, if the printer in using a COM Port, select the correct COM port from the list, otherwise select the LPT1 port), then click Next.

8. Select Manufacture: Generic and Printer: Generic / Text Only.


Add Printer Wizard
Install Printer Software
The manufacturer and model determine which printer software to use.
Select the manufacturer and model of your printer. If your printer came with an installation disk, click Have Disk. If your printer is not listed, consult your printer documentation for compatible printer software.
Manufacturer
Epson
Fuji Xerox
Fujitsu
GCC
Generic
Printers
Generic / Text Only
Generic IBM Graphics 9pin
Generic IBM Graphics 9pin wide
MS Publisher Color Printer
This driver is digitally signed.
Tell me why driver signing is important
Windows Update
Have Disk...
< Back
Next >
Cancel

9. Click Next until the wizard is finished.

   If the driver is already installed follow the recommended procedure.
   You may also want to print a test sheet to make sure that the printer is attached and working correctly.

   This procedure is similar in Windows Vista and Windows 7.